BUILD WITH 318

SAMPLE PREVIEW

CLIENT SYSTEMS WORKBOOK

Client-Ready Business Systems

Build a confident client journey,

from first inquiry through follow-up.



SELF-GUIDED COURSE + PRACTICAL WORKBOOK

5 lessons • printable worksheets • quick-reference sheets • 30-day plan

Welcome and course guide

This self-guided course helps independent service providers organize the steps around client work. You will map a practical path from an initial inquiry through a consultation, proposal, project delivery, closeout, and follow-up. Use the worksheets to shape a system that fits your services, capacity, and working style.

The course is designed for consultants, creatives, coaches, tradespeople, and other small service businesses. No special software is required. You can work through the lessons in order, write directly in this workbook, or use a digital copy and save your own version.

What you will build

- A concise service and scope snapshot.
- A simple inquiry and consultation path.
- A proposal-to-payment readiness checklist.
- A client kickoff and project delivery map.
- A closeout and follow-up routine.
- A one-page client journey quick sheet and a weekly pipeline review.

Suggested self-study path

Module	Focus	Work product
1. Clarify your offer	Service, outcome, deliverables, and boundaries	Service snapshot
2. Handle inquiries	First response, intake, and consultation preparation	Inquiry path and consultation notes
3. Confirm paid work	Proposal, written terms, payment steps, and kickoff trigger	Proposal readiness check
4. Deliver consistently	Kickoff, milestones, updates, and scope changes	Project map and change log
5. Close and continue	Handoff, feedback, referrals, and follow-up	Closeout plan and 30-day follow-up

How to use each module

Read the short lesson, complete the worksheet, then choose one small change to put into practice. You do not need a perfect system before taking a first step. Keep the workbook as a working reference and revise your process as you learn.

MODULE 01

Clarify the service before you sell it

A clear offer helps a potential client understand whether your service fits their need.

A client-ready offer names the person or business you help, the problem you address, the work you will do, and the result the client can reasonably expect from that work. It also says what is outside the scope. Clear boundaries help both sides decide whether to proceed.

A simple offer formula

I help [type of client] with [specific need] by providing [service or deliverable], so they can [practical next step or outcome].

Define the work

Separate the service into deliverables, client responsibilities, and boundaries. Avoid promising a result that depends on factors outside your control. State assumptions plainly, such as the information the client must provide or the number of review rounds included.

Module 1 practice

- ☐ Name the client type or situation the service is designed for.
- ☐ Describe the problem the client wants help solving.
- ☐ List what you will deliver and what the client must provide.
- ☐ Write down what is excluded or requires a separate agreement.
- ☐ Check whether your description is specific and realistic.

WORKSHEET

Service snapshot

Complete this page for one service you plan to offer.

Service name

Best-fit client or situation

Need or problem the service addresses

What I will deliver

What the client will provide or do

What is outside this service

A realistic next step the client can expect

My one-sentence offer