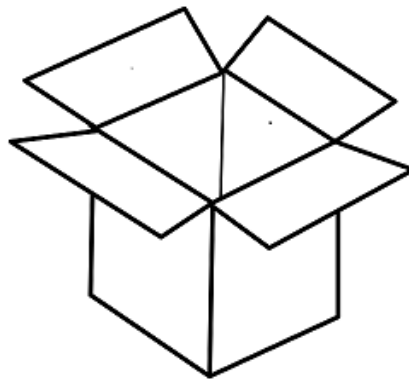




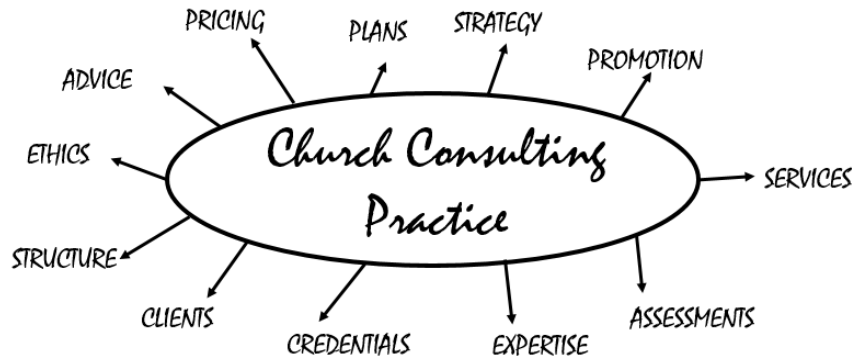
*The Church Consulting  
Starter Kit*



*The Church Consulting Starter Kit*

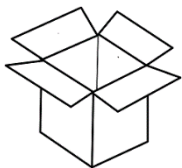
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## Why a Kit?



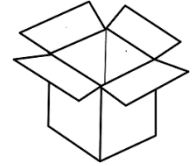
If you look up the word “kit” in a dictionary, you will find that it is a set of equipment or tools needed for a specific purpose. At the Society, we know that when you first sense a calling to the field of church consulting, it would be helpful to have set of tools to help you get started.

The diagram above is meant to illustrate that launching a church consulting practice has many facets. You can simplify it and only address some of those topics. However, you and the churches you serve may not like the outcome. The truth is, the listing of words used in the graphic is only a partial list of the things you will want to address if you want to launch a professional practice that has maximum impact for His Church.



This *Starter Kit* has been developed to help you think through this list and more. It is specifically designed to help you navigate your decisions as you seek to launch a successful church consulting practice. We cannot guarantee your results (see disclaimer on page 29). But you can expect that it will assist your decision making. So let’s get started and open your *Kit*.

## What's in Your Kit?



### **What is Church Consulting? (Page 4 of this document)**

It can be helpful to start at the beginning with input from “the dean of church consulting”.

### **An Introductory Guide (Pages 5-9 of this document)**

As you think about launching or relaunch a consulting practice there are some preliminary matters worth considering. This section will briefly introduce Your *Starter Kit* with some guiding thoughts.

### **An online webinar to assist you in the use of your kit**

The webinar is a brief introduction to the use of your *Starter Kit* by Society President, Jim Barber. The link to this online webinar is: <http://content.jwplatform.com/videos/e7qIX0Qk-T4Y04Rxv.mp4>  
Click into that. You will complete a brief registration for this free session online.

### **Your Planning Reference Manual (Pages 10-29 of this document)**

This is a comprehensive guided planning tool that is tailored to the Interests of church consultants. You will do your planning work in a separate Working Document. But this Reference Manual will guide you.

### **Your Planning Working Document**

This Word document will be emailed to you separately. This is where you will create your plan to launch your consulting practice.

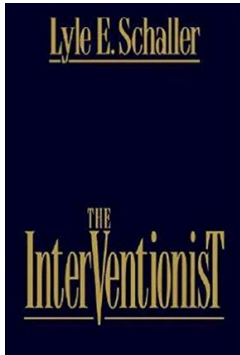
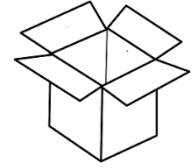
### **A Gantt Chart**

This Excel document will be emailed to you separately. After you have written your plan in the Working Document, this tool will help you implement your plan, stay on track, and make progress.

### **Coaching**

Society nonmembers and Basic Members can receive 1 hour of phone, Skype, or FaceTime coaching in the use of the *Starter Kit*. Society Premium Members can also use their coaching hours for this purpose.

# What is Church Consulting?



Christianity Today called Lyle Schaller the dean of church consulting. He had a long-term career in this field, was the author of 55 books, and he edited many more. One of his books, written in 1997, is *The Interventionist*. In it, Lyle gave his perspective on the definition of church consulting.

He had much to say. The following are a few things he had to say about what a church consultant is.

If we combine his thoughts we can create a statement as follows:

*A church consultant is an outside third party to a denomination or a church. They are someone gifted for it or has learned skills or both. They are able to formulate relevant questions and are an active listener and a learner. They are able to offer a diagnosis using a conceptual framework of what the Church and a local church in its context should be and be doing.*

There are a couple of important observations to be made here. First, a consultant consults a denomination or a church not individuals. And by church, we might say the leadership team or the church as a whole. That's important because coaching of individuals is popular today but the role of the consultant is different from the role of the coach of individuals. Both are useful and a consultant may coach and a coach may consult. But they are not the same.

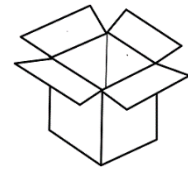
Second, he says that the skills can be learned. At the Society, we agree with that and our training can do that for you.

Finally, Lyle emphasizes asking, listening, and using a framework to diagnose a church. It is interesting to note the parallels between Lyle's thoughts and the activity of Jethro with Moses in Exodus 18:

| <b>Verse(s)</b> | <b>Jethro's Consultative Actions</b>                                                                                                                                                                           |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 14              | He saw or observed                                                                                                                                                                                             |
| 14              | He asked why?                                                                                                                                                                                                  |
| 18:1<br>3:1     | He had a conceptual framework from which to diagnose. He had ministry experience as the priest of Midian. He also had marketplace experience as a shepherd with under-shepherds like Moses who worked for him. |
| 17-23           | He recommended                                                                                                                                                                                                 |

At the Society, we use this definition of a church consultation. Note the possibility of working alone or in a group. Note too that there are generalists and specialists: *A church consultation is a process in which an individual or a team provides insights, recommendations and guidance to improve the overall health of a church, or to assist in a specific area of church need.*

# Introductory Guide



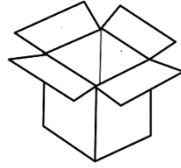
**We recommend that you read through this guide first.** It will help you gain perspective on the path required for you to launch your practice. The other parts of your *Starter Kit* are tools that will help you along the way. They are built in part on this introduction.

You will note there are five sections to this guide. The first is your **Personal Preparation** highlighted above with an underscore bar. The underscore bar will move on the next pages as we move through each of these five sections. For each section, there is a proposed Application.

The Society urges you to approach the idea of launching a consulting practice prayerfully and with all wisdom. From our experience, and the counsel of others in this field, there is wisdom in thinking carefully in three areas as stated in this table.

| <u>Three Areas of Consideration</u> | <u>How to Think with Wisdom</u>                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Your Calling</b>                 | The need of the Church for consultants is great. At the same time, the Church needs consultants with the right amount of ministry and other experience. If you have not taken the assessment in the Society’s Free Consultant Training Guide available on our website home page, do so now. What does this assessment say about your readiness to consult?                                                      |
| <b>Your Platform and Potential</b>  | It is a very rare person that can go right from a ministry or marketplace role into consulting full time. A wise leader, Dr. Gary McIntosh, give this advice, “Don’t quit our day job”. Unless you have a full-time position in denominational leadership, it is much better to think about transitioning into consulting versus going full time. Protect yourself and your family by thinking clearly on this. |
| <b>Your Capacity</b>                | None of us are good at everything and launching a consulting practice requires many disciplines. For example, you will likely need a website, a set of financial books, graphics capability, promotional tools, general business knowledge, and more. What are you good at and where will you need help? This guide will help you think through the answer to that.                                             |

**Application:** For your personal preparation for church consulting, make these things and others a matter of prayer. Ask your spouse and friends to pray for you as well.



When someone says that they want to get into church consulting, that can mean many things. For example, do you envision working alone or with others? What types of services will you provide? Why? And, there are many dimensions of the Church. Which sectors of the Church will you serve? These questions break down into three categories: Your Structure, Your Services, and Your Clients. More will be said in your Reference Manual. But consider these for now:

❖ **Your Structure**

Some will conduct their consulting from a denominational position where you likely have a ministry/job title called Church Health, or Church Strengthening. Others will consult alongside their full time or part time ministry position. Still others will develop an independent practice and they will serve more than one denomination as well as independent churches. How about you?

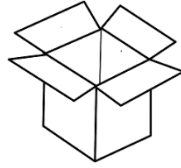
❖ **Your Services**

Another important option for you to think through carefully is what services you provide. You may have a general understanding of this. But you may not be aware of other services that you could provide if you received training or had greater awareness of what others are providing. Will you assess health, facilitate planning, resolve conflict, or provide some form of specialized consultations?

❖ **Your Clients (Your Target Market)**

Perhaps you have considered this, but there are many different church clients out there that may or may not be interested in your services. In part, they will compare you and your experience to others who may have experience that is more like theirs. From a business model standpoint, this is called understanding your target market.

**Application:** Be open to considering other options. Build on your starting place on these matters by considering the new ideas your *Starter Kit* may bring you.



If you are considering starting a church consulting practice, you likely have ministry experience, and perhaps marketplace experience. You may also have already been sought out by other churches for help. These things are a good starting place for a successful practice. But have you thought about going beyond that?

What if you could gain from the experience of others that have been in the field of church consulting for, in some cases, decades? What if you could add their experience to yours and arrive at something even more substantial? You can, through Society Training and Certification.

❖ **The Value of Credentials**

Most disciplines carry some form of licensing or certification. For example, if you look at the fields of ministry, medicine, engineering, accounting, information technology and others, you will see that it is common that credentialing is expected. Credentials demonstrate that you have completed a certain amount of education, training, and possibly supervised practice. They say to the person considering using your services, “This is a person that takes their profession very seriously.”

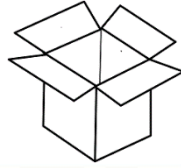
❖ **Society Training**

If you have not downloaded the Free *Consultant Training Guide* from the home page of our website, please do so now. It is a comprehensive overview of the various ways that you can be trained. Our Levels 1-4 training is academic. Our Level 5 training is a practical consulting project.

❖ **Society Certification**

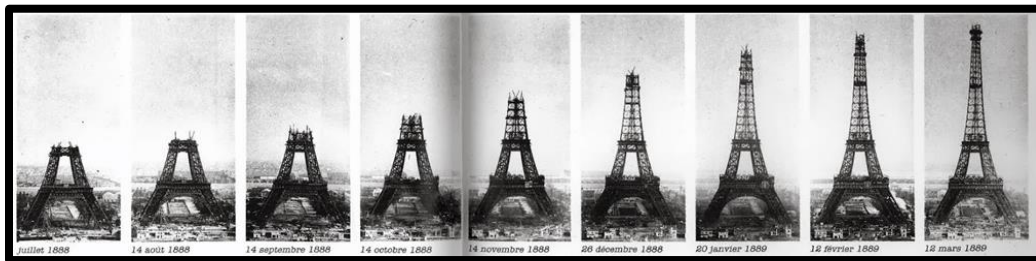
Following Level 5 training, you can complete certification. You will then be able to use our logo, say that you are a certified consultant, and be listed in our online directory.

**Application:** If you haven’t been planning to become trained or certified, we encourage you to reconsider this. Most are surprised by the richness of the content and how it prepared them to serve much more effectively.



Any worthwhile endeavor requires careful planning. Jesus demonstrated the depth of his knowledge of this when he was teaching about discipleship in Luke 14:28. He said, “*Suppose one of you wants to build a tower. Won’t you first sit down and estimate the cost to see if you have enough money to complete it?*” He used a commonly understood business practice to teach a heavenly principle.

Imagine for a moment building the Eiffel Tower. Can you imagine doing this without planning? How high would the tower get? 30%? Half-Way?

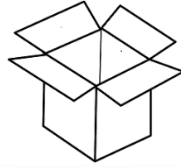


Some of us suffer from a malady called the “Ready-shoot-aim” syndrome, charging into something without a plan. Planning is not everything, but it will often help us produce something that is much more practical and successful than if we did not plan at all. It is almost always better to get ready, aim, and then shoot!

The heart of your *Starter Kit* is a guided approach to planning your church consulting practice. Your *Planning Reference Manual* is designed to give you a comprehensive tool to consider as many aspects of launching a practice as is necessary. You will not regret the discipline this tool will provide you. You may not want to write a plan as detailed as the one provided. However, it will likely provide almost all that you will need to consider.

**Application:** The Society recommends that you construct a plan as you consider launching a consulting practice. Consider how your *Planning Reference Manual* (beginning on page 10) can significantly assist you with that.





As important as your plan is, executing it is even more important. Plans are plans. Execution of your plan can change both you and the Church! You may be able to do some execution while you are developing your plan. But, after you have written your plan, plan for success by following these tips that may just be what you need to get your plan launched.

❖ **Be Realistic about Timing**

For an independent consulting practice where you set up a legal entity and do your own promotion, six months of execution is realistic. It takes time to develop your services, get those on a website, price them, and more. Give yourself adequate time.

❖ **Establish Weekly Check-ins with Your Plan Execution**

It is a good idea to monitor your progress once a week. Ask yourself how it's going, what needs to be done now, and what can wait.

❖ **Use a Gantt Chart**

For any complex project with an end date, this is a great tool. It will help you keep the many tasks organized. Your Reference Manual will help you with this.

❖ **Learn and Adjust**

You will probably have starts and stops and realize that you forgot something. That's okay. Just learn and adjust as you go.

❖ **Get Help**

Ask yourself what you can delegate and to whom. Then delegate.

❖ **Get Encouragement**

Share your plan with someone that you know will be supportive and pray for you.

❖ **Be Disciplined**

“No discipline seems pleasant at the time, but painful. Later on, however, it produces a harvest of righteousness and peace...” Hebrews 12:11



## **Planning Reference Manual**

### **Contents**

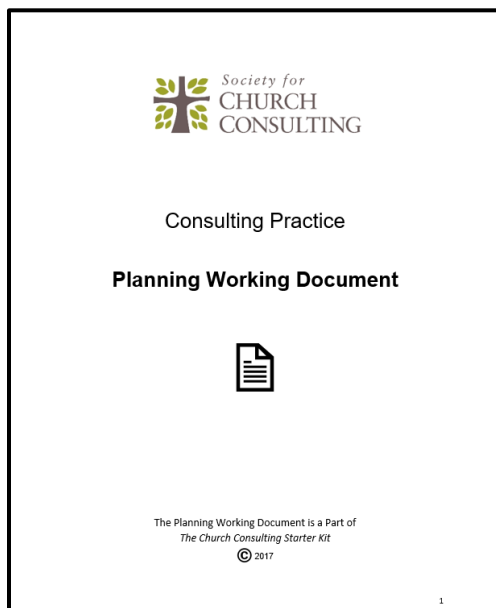
(Instructions for each section and subsection of your  
Planning Working Document)

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## Introduction to this Planning Reference Manual

This *Planning Reference Manual* is an important part of your *Church Consulting Starter Kit*. For the person aspiring to have a consulting practice, it will likely prove to be your most helpful tool. It will also require a significant amount of work.

It has been developed in part by using free resources available from the U.S. Small Business Administration that have been edited for the context of church consulting. In addition, the Society President has experience developing and launching a community involvement nonprofit recognized by the IRS, creating the Society as a separate legal entity recognized by the IRS, and launching his own church consulting practice as an LLC. He also has coached and observed the launching of consulting practices by others for nearly seven years.



This *Manual* has also been designed to be used in conjunction with two other parts of your *Starter Kit*. First, is your **Planning Working Document** pictured to the left. For every section and subsection in this *Planning Reference Manual*, there is a corresponding blank section in your Working Document which is a Word document. It is there that you will use this *Reference Manual* to guide the writing of your plan.

The second *Starter Kit* resource that will help you complete your *Planning Working Document*, is the **webinar called *The Church Consulting Starter Kit Webinar***. This online resource will give you overview instructions on how to complete your plan. If you have not watched the webinar online yet, now is the best time to do that. The link for the webinar can be found on page 3.

After reading and reflecting on the introductory parts of your *Kit* on pages 1-10 of this document and watching the online webinar, you are now ready to get started developing the plan for your church consulting practice on the next page.

We recommend that you consider a subsection of this reference manual one step at a time. As you consider the guidance provided in each subsection, then go to your *Planning Working Document* and write your plan.

## 1. Consulting Practice Description

Your description will define for you and others why you exist, who you are, and what's important to you. It may not all be something that you make public. For example, your vision can be an internal plan you have to grow the practice. The more you can succinctly describe your practice, the easier it will be to communicate who you are and stay focused.

### Name and logo

What are you going to call your consulting practice? This will be important for your creation of a website, business cards, letterhead, newsletter, and other promotional material. If you incorporate or form a legal entity, a name will be required. Some use their personal name, like Barber Church Consulting. Others use a descriptive name such as Church Growth Network. Still others use a creative name like a meaningful Greek word or The Church Whisperer. There are pros and cons to each type of name. Take your time with this because it will likely be something you use for many years. You may also want to do a name search to ensure you don't use someone else's legal name. After you have a name, you can also create a logo.



### Mission, Slogan, or Tag Line

What is the purpose of your consulting practice? Why does it exist? Keep this brief using the T-shirt test, i.e., could it fit on the back of a T-shirt? It should also be specific but capture all that you will do. If you are going to do coaching and consulting, you may want to say that. Some will use a tag line in place of a mission statement. Examples of tag lines used in the business world are Nike's "Just Do It" or State Farms "Like a Good Neighbor, State Farm is There".

### Values and Ethics

What types of values and ethics will guide your practice? For example, you may want to mention the Great Commission, or biblical foundations. If you become certified by the Society, you will be required to commit to a Code of Ethics which addresses integrity, confidentiality, and other matters. That could also be listed here.

### Vision



While your mission is enduring, and may define why you exist for as long as your practice exists, your vision is a preferable future compared to today's reality. Vision informs your strategies regarding how you will accomplish your mission. It also motivates you. When you are just starting your practice, a healthy vision is to think through what you want your practice to look like at most one or two years from now. It may include becoming organized, how many

clients you will serve, your completion of training and certification, or the development and launching of new services.

### History and Experience

You may be just starting and have no experience. Or you may have had some formal or informal experience of helping other churches. You could list your ministry experience or marketplace experience if that is relevant to the type of consulting services that you plan to provide in the future. By listing these, it can help you develop your website or other promotional material.

### Strengths

Everyone has strengths. What will you and your consulting practice bring to a church that will help them become more effective? This might be all or part of your StrengthsFinder profile. It may also be a featured aspect of your services. There is a prideful and a humble way to be aware of and express our strengths. A humble way is in keeping with biblical values. Consider expressing yours to help churches see what you can bring them and how you can serve them with your God-given abilities and experience.

## **2. Church Consulting Target Market**

When you get started in your consulting practice, you may already have an established base of clients you have been helping. There are likely others who are providing consulting services in your area. It is also healthy to think through the need for your services and to whom you intend to provide them. If you don't address some of those decisions now, you will need to at some time. This section helps you think through these matters.

### Macro market and need for consultants – opportunity

## Church Consulting Future Trends

What is your understanding of the need the Church at large has for consultants? If you have taken Society training, you can use some of that content here. State the general status of the Church and how consultants are needed in general.

### Need for your consulting practice

The macro section prior to this one addresses the big picture of the general need the Church has for consultants. This section asks you to think about the need the Church has specifically for your consulting practice. How will your practice help churches? For example, you might say that your practice will excel at conflict resolution, or strategic ministry planning, or disciple making.

### Competition and how you can distinguish services

In one sense, we are all on the “same team” in the Church. However, there may be others providing the same or a similar consulting service as you plan to offer. Who is doing this and what will be distinctive about your practice from theirs? What will you do the same or different? How will your practice be attractive even in the context of “competition”? For example, you may distinguish yourself with products, services, coaching, pricing differences, or in other ways.

### Collaboration and how you can work together

The thoughts you have here may inform the Management and Organization Structure section below. Consider who you might work with. This could be a formal, legal entity arrangement. It could also be an informal teaming arrangement that is not a legal entity. Or, it may just be someone you will refer churches to if they are looking for services that you do not provide. Similarly, you can ask them to refer churches to you.

### Established Customer Base

If you have done some consulting in the past, even if you did it as a favor for a friend or free for someone you are associated with, that is a base of relationships. One thing to remember about consulting is that past clients generally make good future clients because of the established relationship and their confidence in your abilities. What church or churches could you promote your services to because of your past consulting relationship?

### Consulting sector target



Depending on your background and services, you may have the capacity to help not only churches, but faith-based nonprofits, other nonprofits, and even for profit companies. Being available to more than one sector may be a solution to having a viable consulting practice with more than one source of

income. You can change your target on this later. But it is a good idea to start out with an intentional path regarding who you will target.

### Denominational target

If you are part of a denomination, will you confine your consulting to just that one denomination or will you be available to others? Will you be available to non-denominational churches? Will you be comfortable serving those with a different polity and theology from yours? You can address some of that later. But, once again, it is a good idea to have a starting idea on this.

### Geographical target



Another consideration is what geographical area you will serve. Are you planning to serve churches locally, within your city, county, the nation, or internationally? Planning this now will save you time later.

### Church size target

You may also want to consider the size of the church you will serve. Depending on the type of services you will offer, your personal ministry experience, and even your sense of God's calling, you may decide to help small churches (less than 200 in weekend worship), small and medium, medium and large, just large churches, or all size churches from church plant to 1000+ in weekend worship.

### Other target characteristics

As you think of the four previous categories of target market, is there anything else about your services or experience that informs what churches you will consult? For example, you might only serve those in conflict, or those in need of strategic ministry planning.

### 3. Description of Church Consulting Products and Services

Your consulting practice will offer churches some form of product(s) and/or services(s). Some of these may be fully developed and others may be conceptual or in development at this time. Describe the products and services you intend to provide. Consider the following possibilities.

#### Coaching

There is informal coaching which most consultants do that is encouragement of other leaders, possibly praying for them and with them, helping them have faith to lead well. But there is a formal type of coaching for which you can become trained and certified, however, not through the Society. You may provide this service in person or by Skype, phone, or some other technology.



#### Training

Will you provide training forums of some kind, either in person or online? What are the topics? Who is your audience? What are the characteristics of this training?

#### Facilitating

Facilitation helps a leadership team become exposed to your expertise and you motivate them to make decisions and find unity on certain topics. Strategic ministry planning or vision development are examples of this. Conflict resolution could also fall into this category. Describe your plans to facilitate for church leadership teams.

#### Assessments

One of the strengths of the Society is to train you in how to do a comprehensive church health assessment and modifications of that. Will you conduct such health assessments? Or perhaps you have other assessments in mind such as financial practices, or worship.





## Purchased Services

Society training discusses the use of a purchased demographic service called Percept. There is a similar service called MissionInsite. Perhaps you will provide that service. However, there may be other purchased services such as staff development tools like Myers Briggs, or StrengthsFinder or some similar tool. Describe purchased services that you will provide and interpret for churches.

## Products

You may have products that you will provide churches such as manuals, books, videos, or podcasts. Describe any products you intend to provide.

## Plans to develop services and the realistic timing of development

Do you know of services that you plan to offer in the future? For example, Society training may make you aware of services that you have not considered in the past. Describe your future services and when you think you will be ready to offer those to churches.

## Service Specialties

The Society has researched 200 church consulting websites and found the following listing of 34 Consulting Specialties. Some have already been listed above. Consider this list and ask if you intend to research or develop and offer these services in the future. The list may also help you refine your terminology.



1. Developing a church Vision
2. Strategic Planning
3. Organization Design
4. Board Governance
5. Role of the Staff vs. Board
6. Facility Design/Expansion
7. Stewardship/Fundraising
8. Worship Ministry
9. Multi-Venue or Multi-Site
10. Branding/Marketing
11. Community Service
12. Incorporation of Non-Profits
13. Systems Design/Implementation
14. Administration
15. General Coaching
16. By-Law Redrafting
17. Ministry Audits

18. Relocation
19. Leadership Assessment
20. Financial Analysis/Policy/Accounting
21. Financing
22. Cultural Change
23. Small Groups
24. Hospitality and Guests
25. Aligning Vision and Practice
26. Gift Training
27. Human Resource Management
28. Demographic Studies
29. Salary and Benefit Planning
30. Outreach
31. Technology
32. Missions
33. Security
34. Education and Training

#### 4. Management and Organization Structure

It is important that you have a clear understanding of how your consulting practice will be organized. It may be just you. Or, it may be you in a denominational role or overseeing or partnering with others.



This section is about how you will function and what roles you or others will play. There are tax considerations in these decisions. This is where you can also think about professional development. Finally, it is also about what you will represent about yourself to others, including your credentials.

##### Denominational role, pastor, or independent consultant

State as clearly as you can how you intend to deliver your consulting services. Will you be on staff at a denomination where it is your role to strengthen churches? Or are you a pastor with a God-given network of relationships? Or you may be planning to be an independent consultant available broadly to help churches from various denominations and independent churches.

##### Legal entity such as an LLC or Partnership or nonprofit corporation

If you will not be a part of a denomination staff, will you organize a legal entity for what you plan to do? There is cost and effort required to do so. However, the benefit is that you can limit your liability if for some reason a legal matter arises. You may want to get legal counsel before you decide. If you plan to be a nonprofit, will you seek charitable 501(c)(3) status with the IRS?

### Informal partnership

Even if you do not form a legal entity, you may want to team or have an informal partnership with one or more others. For example, perhaps you will be the consultant, and your team members will be a coach or a trainer. Consider your network of relationships. Consider also writing a letter of understanding that your informal partners agree to.

### Employee of an entity or independent contractor

The IRS has very specific rules regarding whether they will consider you an employee of an entity or if you qualify as an independent contractor. You may want to seek financial counsel to ensure that you start out with a clear understanding of the difference and how you will operate.

### Filing with IRS to seek charitable status

If you are going to be a nonprofit and seek charitable status, you will need to file with the IRS and the process can take 3-9 months. The sequence required is to incorporate first in your state and then file with the IRS. Who will do this?

### Filings with the state, incorporation, etc.

If you form as any kind of legal entity, you will have to file at the beginning of your endeavor and then you will likely have state filings annually with the Secretary of State or possibly the Attorney General's office. Learn the requirements in your state. Who will do these filings?

### Credentials that you hold or plan to

Your credentials, or those of your partners or teammates can make the difference between securing church clients or not. List credentials that you hold or plan to hold. If you are planning to become certified by the Society or you or someone else is seeking coaching certification, list that here.



### Financial responsibilities: banking, bookkeeping, reports, paying taxes



Who will be responsible for taking care of your books, banking, paying taxes on your income, and other financial matters?

### Website and information technology responsibilities

You may need a separate website for your practice. You may also need other technology support for email, pc security, installing new apps, finding new software, etc. Who will do this?

### Miscellaneous administrative assistance and other responsibilities

Think about how you will accomplish various tasks to support your consulting practice. For example, who will take care of copying, mailing, creating reports, purchasing supplies and other responsibilities?

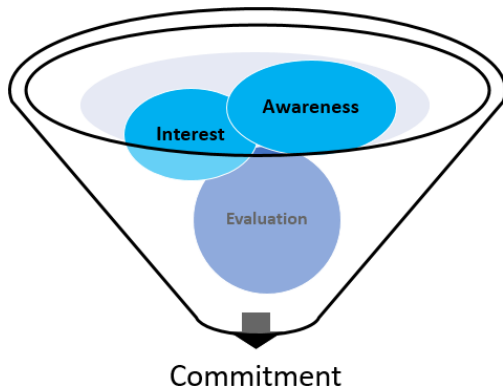
### Place of business

Where will you and your teammates office? Will you conduct business from home, a church, or from a rented space?

### Leadership and skill development

How will you and your other teammates (if any) stay sharp? What will be your practices for learning new skills?

## 5. Promotion Plan



If you think about it, every church client will only make a commitment to use your services if they are first aware that you have services, then become interested in the possibility of using those services, and then evaluate if using you is their best option. So, as important as planning your target market, your services, and your structure are, they are somewhat powerless without a promotion plan. God will use your prayers and do wonderful things. He will also use your promotion plan if you have one. The starting place is to plan to build awareness. Consider the following 10 options.

### Website

In many cases, before they talk with or email you, they will see you on your website. Develop an attractive, inspirational, and informative one. With websites, it is true that there are the *good*, the *bad*, and the *ugly*. Which type will you have?

### Free Services, introductory discounts, or bartering

While it is important that churches value your services, and they do that partly by paying a fee, an important promotional tool is to offer products or services for free. Consider what you might offer for free or for a discount. Consider too bartering by providing your service in return for a service they might be able to provide you such as website development or graphics.

### Networking

Consulting is about relationships, relationships, relationships. Consider how you can network with pastors and other church leaders at conferences, in ministerial associations, or other organizations. You may want to frequent a coffee shop. You may also want to adopt the approach of inviting pastors out for coffee or lunch at least once a week or more frequently.



## Cold Calls

Another promotional approach is to make cold calls to pastors to ask if you could have a block of time to make them aware of your services.

## Conference Booth

Denominational groups usually have at least an annual conference where the majority of their churches participate in events over two or three days. You could ask if you could set up a booth to make people aware of your services.

## Mailings

You could develop a mailer and send it to churches in your area. If you send it by U.S. mail, you do not have to have permission. If you use an electronic mailing service, you generally need the churches permission before you mail to them.

## Follow up services

One of the best ways to provide future services is to do a good job on your current services and to make your church client aware of others ways that you can serve them. Ask for an opportunity to share your other services.

## Demonstrate the benefits of your services



How can you convey the benefits of your services? Do you have an elevator speech? I.e., if all you had was the time of an elevator ride with someone, could you express the nature and importance of your services? How will you provide something that they cannot do for themselves and as good or better than others?

## Endorsements and References

A testimonial from others you have served can give potential new clients more confidence in selecting you to serve them. When you provide services, ask your church clients if they can be added to a references list that you develop. You may also want to ask them to write a one to three sentence endorsement of your services. Put your reference list and endorsements on your website. You can also send it out to those to whom you submit a consulting proposal.

## Write and or blog

One way to develop a platform from which people will recognize your expertise is to become published or write a meaningful blog. You can self-publish or seek a publisher. Write manuals, articles, or books, or consulting assessment tools. You will find that writing will also help you find your voice and improve your ability to express yourself verbally.

## **6. Pricing Plan**

It is important that you think ahead about how you will price your products and services. Research websites of other consultants to learn what you can. If you have a consulting mentor, ask them. Think through these optional ways of pricing your services. After you launch, listen for feedback to determine if you are pricing realistically.



### Price your products

If you have products such as user manuals, books, or assessments, how will you price these? Compare in the marketplace to ensure that your prices are realistic.

### Price your hourly services

You will want to charge a fixed fee for some services (see below), however some services are more aligned with charging an hourly rate. For example, if you are going to meet monthly with a pastor over coffee or lunch, an hourly rate might be best. How much per hour will you charge. Hourly rates vary based on your experience and expertise from \$40 or less to \$150 or more. Also, what will be your policy on charging for travel time and travel expenses if you provide an hourly service?

- Rate per hour
- Travel to and from an hourly service

### Fixed Fee for projects

If you are providing a consulting service project such as a church health assessment, facilitated strategic planning, or conflict resolution, you might want to charge a fixed amount plus travel. You might also want to tier your charges based on the size of the church because there is often greater complexity with larger churches and there is less affordability for smaller churches.



Project: \_\_\_\_\_

Small size church fee (plus actual travel):

Medium size church fee (plus actual travel):

Large size church fee (plus actual travel):

Project: \_\_\_\_\_

Small size church fee (plus actual travel):

Medium size church fee (plus actual travel):

Large size church fee (plus actual travel):

Project: \_\_\_\_\_

Small size church fee (plus actual travel):

Medium size church fee (plus actual travel):

Large size church fee (plus actual travel):

### Cluster Pricing

If you have a situation where several small churches might like to use your services, but your project price even for a small church is too great for them, consider doing cluster pricing. This may not work in every situation. But the concept is that you deliver a large group service for 3-5 churches at one time with breakout sessions for each church. By clustering them for some aspects of the service, you may be able to give them a discount of 20% or more off your small church fee.



## Pricing Retainers

If a church client wants to use your services, but can't specifically define when and how they want to use you, you might consider offering a retainer. Under this arrangement, you would agree to be available to them for an ongoing monthly fee for a period of time. In return, they can call you, email or text you, Skype or Facetime with you with short notice.

## Pricing Discounts

There may be circumstances when you will provide your clients with a discounted hourly or project rate. For example, consider giving a first-time customer discount of 10% off your normal fee. Or, if you have a coaching relationship with a pastor on an hourly basis, you might consider a discount if they want to contract with you for one of your consulting project services. If you offer a discount, it is a good idea to display the full price, the discount, and their net amount owed when you do.



## Pricing Options

One way to attract interest in your other services, is to offer a lower option fee if they agree to use another one of your services within one year. For example, you might contract with them to complete a church health assessment, and then build into that contract a 10% discount on your service of facilitating strategic ministry planning if they exercise the option for that within one year.

## Price Bundling

Price bundling is like an option, however in this case the church client agrees to contract with you for two of your services from the beginning. In this case, the bundling discount is usually greater than the option discount because they are assuring you of business from the beginning and you reward them with a greater discount.

## Pricing Down Payments and Time Payment Terms

To help a church with cash flow affordability, you might want to offer them a down payment and final payment plan, or a down payment with several timed payments over several months. For example, on projects you might ask for a down payment of 30 or 50% with one final payment for the remainder. Or you could request a down payment of 50% with six monthly payments for the remainder.

## 7. Startup Expenses and Source of Funds

It is important that when you start your practice, you avoid getting yourself into a situation where you are harming yourself financially from the beginning. The way to avoid this is to plan what you will need to spend to get your practice started and then plan how you will fund those expenses, preferably without debt.

### Listing of Startup Expenses



Your startup expenses are those expenses you will incur just to get your consulting practice going. Examples would be a computer, software, a printer, a projector, website development, graphics support, and printing a supply of brochures. Do not include here ongoing monthly fees for a phone, web hosting, email, etc. We will address those in #8

below, Financial Plan for the First Year.

Complete this table to list your startup expenses

| <u>Describe the expense:</u> | <u>Estimate the cost for each:</u> |
|------------------------------|------------------------------------|
| computer                     |                                    |
| printer                      |                                    |
| website development          |                                    |
| Etc.                         |                                    |
|                              |                                    |
|                              |                                    |
|                              |                                    |

## Total Startup Expenses and Cash Required

Total the expenses in the right column to arrive at a total startup expense. This is the cash that will be required to start your practice.

My Startup Cash Required is: \_\_\_\_\_

## Startup Cash Available or Assets Available that could be liquidated

Now that you know your startup expenses, consider how much startup cash you have on hand. If your cash on hand is not enough, could you sell something or use a savings account to help?



My Startup Cash Available is: \_\_\_\_\_

## Surplus or Shortfall

Now compare your Cash Required to your Cash Available (including other assets liquidated). If you have more Cash Available than needed that is a Surplus and you are in a good position to start your practice. If you have less Cash Available than needed, you have a Shortfall that needs to be addressed somehow.

My Startup Cash Surplus or (Shortfall) is: \_\_\_\_\_

## Anticipated Borrowing

If you have a Shortfall, first consider waiting until you can save more money for your startup. If you do plan to borrow, we recommend that you only do so if you can reasonably expect to easily pay down the debt from your future income and cash flow. Do not put yourself in a position of debt that you cannot reasonably expect to pay down.

## **8. Financial Plan for Your First Year**

It is a good idea to have a realistic, conservative estimate of the financial outcome of your first year in a consulting practice. Put together a conservative net income forecast for the first year. When you do financial planning, a conservative sales plan underestimates sales, and overestimates expenses. Do not be too optimistic. Be a realist if not a slightly pessimistic realist. This exercise will help you determine a realistic picture of how much of your total income needs can be met by church consulting. For most, church consulting must be accompanied by at least one or more other sources of income.

My Conservative Sales Plan

Sales from products sold: \$ \_\_\_\_\_  
Sales from hourly contracts: \_\_\_\_\_  
Sales from fixed fee projects including options and bundling: \_\_\_\_\_  
Sales from Cluster pricing projects \_\_\_\_\_  
Sales from Retainers \_\_\_\_\_  
(A) Total First Year Sales Estimated \$ \_\_\_\_\_

My Conservative Expenses Plan

Salaries \$ \_\_\_\_\_  
Travel \_\_\_\_\_  
Space rental costs if any \_\_\_\_\_  
Purchased products or services \_\_\_\_\_  
Website, email, internet, phone \_\_\_\_\_  
Postage and supplies, other \_\_\_\_\_  
(B) Total First Year Expenses Estimated \$ \_\_\_\_\_  
  
(C) Projected Net Income (A-B) \$ \_\_\_\_\_  
  
(D) Taxes (Federal and State) on Net Income \$ \_\_\_\_\_  
  
(E) Total First Year Net Income after taxes (C-D) \$ \_\_\_\_\_

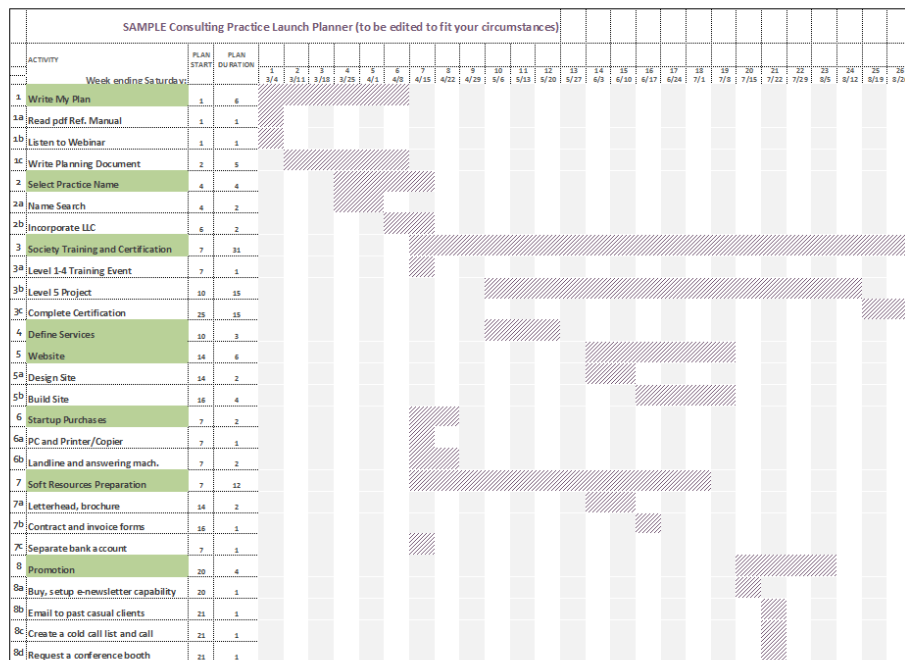
**9. Consulting Practice Plan Summary**

Congratulations! If you have made it this far, you have accomplished something very significant. You have mapped out a detailed plan to launch your church consulting practice. Now it is time to summarize this. This will be beneficial as you think about launching a website. It will also help you prepare an “elevator speech” to help others clearly understand in a few sentences or paragraphs what you intend to do. Using the detailed content in each of the preceding eight sections, summarize the main content of each of those sections in at most one or two sentences. Create a summary of your plan. After you have summarized each section, go back and put your summaries into a cohesive whole.

## 10. How to Use a Gantt Chart

Writing your plan as you have done in sections 1-9 is one thing, but executing it is another. A final step that some find helpful for execution is the use of a Gantt Chart. This is a way to organize your activities, hold yourself accountable, and measure progress. A sample Excel sheet is included in your *Starter Kit*.

This type of chart lists categories of time across the top, and various activities down the left side. We recommend that you think in terms of weeks across the top. A realistic timeline for launch is six months, or 26 weeks. Study your plan and compare it to your sample Excel Gantt Chart. Then make changes to the Excel spreadsheet so the Gantt Chart represents your plan. You will need to think through the sequence of events. For example, it is very difficult to launch a website until you first know what your products and services will be.



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### The Church Consulting Starter Kit Disclaimer

The *Kit*, on this page and the preceding 28 pages, includes guiding statements on IRS, legal, financial and many other considerations based on personal experience and networking. However, the Society cannot be held responsible for final guidance on any of these matters. Each user of the *Kit* should seek local, regional, and federal guidance as needed to ensure compliance and personal success. Results from the use of the *Kit* will likely vary from user to user.