

ARE YOU READY TO BOOK A BUSINESS CONSULTATION?

Pre-Consultation Readiness Checklist
LC Business Consultants & Advisory

PURPOSE

This checklist helps determine whether you are prepared to book and maximize a paid business consultation. If multiple items are unchecked, pause and complete those steps before scheduling.

1. BUSINESS CLARITY

- I have a clear business idea or existing business
- I can clearly explain what my business does
- I know whether my business is for-profit or nonprofit
- I know what stage my business is in (idea, startup, operating, scaling)
- I have identified at least one main challenge or goal

2. LEGAL & STRUCTURAL AWARENESS

- I know whether my business is legally registered
- I know which state my business operates in
- I understand that a consultation does not automatically include filings or documents
- I understand legal formation services are separate from consultations

3. FINANCIAL READINESS

- I understand consultations are paid services
- I am prepared to pay a consultation fee at booking
- I understand additional services may require a deposit or full payment
- I have a realistic budget or investment range in mind

4. DOCUMENT & INFORMATION PREP

- I have my EIN (if already registered)
- I have access to my formation documents (if applicable)
- I can provide accurate business information when asked
- I understand missing information may delay next steps

5. EXPECTATIONS & RESPONSIBILITY

- I understand a consultation provides strategy, clarity, and next steps
- I understand outcomes depend on my follow-through
- I am open to professional guidance and honest feedback
- I am not expecting free services, guarantees, or shortcuts

6. COMMUNICATION & PROFESSIONALISM

- I will arrive on time and prepared
- I understand rescheduling and no-show policies apply
- I will communicate clearly and respectfully
- I understand excessive follow-up outside scope may require additional booking

FINAL READINESS CHECK

- I am ready to invest in my business
- I am ready to take action after the consultation
- I understand this consultation is a business decision, not casual advice

FINAL NOTE

A consultation works best when clarity meets commitment. If you are unsure about multiple items above, complete those steps first—then book when you're ready to move forward.