

# Professional Services Authority Kit

A starter kit for consult-driven professional-service firms that want stronger public authority, cleaner screening, and a more credible proof stack before the first consult.

Firm owners, intake leads, and marketers in legal, accounting, advisory, and consult-led services

## GUIDE

A starter kit for consult-driven professional-service firms that want stronger public authority, cleaner screening, and a more credible proof stack before the first consult.

## WHAT THIS ASSET COVERS

- Professional Services Consult Authority Playbook
- Professional Services Proof Stack Guide
- Personal Injury Intake Qualification Checklist
- Bookkeeping Client Onboarding Checklist
- Immigration Consult Screening Script

## SUGGESTED ROLLOUT

1. Strengthen consult intent and fit guidance before the first call lands.
2. Rebuild the proof layer so expertise, process, and case stories feel more credible on public surfaces.
3. Use the intake and onboarding assets to tighten what happens after the inquiry arrives.
4. Review consult quality and authority gaps monthly so the trust layer keeps compounding.

## WORKING ASSET

Bundle the public authority, intake, and proof assets that help a professional-service firm earn more confident consults.

## RESOURCE STACK

- Professional Services Consult Authority Playbook
- Professional Services Proof Stack Guide
- Personal Injury Intake Qualification Checklist
- Bookkeeping Client Onboarding Checklist
- Immigration Consult Screening Script

## **ROLLOUT SEQUENCE**

1. improve public authority and fit guidance
2. strengthen proof and expertise signals
3. tighten intake and onboarding flow

## **MONTHLY REVIEW**

Check:

- consult quality
- fit clarity
- proof freshness
- screening consistency

## **DEPLOYMENT NOTES**

### **HOW STRONG TEAMS ACTUALLY USE THIS ASSET**

- Assign one accountable owner instead of letting "Professional Services Authority Kit" become shared but unmanaged work.
- Use it with firm owners, intake leads, and marketers in legal, accounting, advisory, and consult-led services in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### **30-DAY ROLLOUT SEQUENCE**

- Strengthen consult intent and fit guidance before the first call lands.
- Rebuild the proof layer so expertise, process, and case stories feel more credible on public surfaces.

- Use the intake and onboarding assets to tighten what happens after the inquiry arrives.
- Review consult quality and authority gaps monthly so the trust layer keeps compounding.

## **WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE**

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Professional Services Consult Authority Playbook, Professional Services Proof Stack Guide, Personal Injury Intake Qualification Checklist, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.