

A PIVOTLAB PLAYBOOK

# The First-Client Roadmap

---

*The 30-day path from corporate expertise  
to your first paying consulting client*

From the team behind *From Corporate to Cash*

**START HERE**

# Why You Don't Have Clients Yet

You spent a decade or more getting very good at solving expensive problems. Then the structure that routed those problems to you disappeared, whether you left on your own terms or the decision was made for you. Here is the reframe that changes everything:

**KEY INSIGHT**

You did not lose your expertise. You lost a distribution channel. Your employer was the pipeline that connected your skills to problems worth solving. The difference between a job seeker and a consultant isn't skill. It's distribution.

This roadmap is the distribution rebuild, compressed into four weeks. One focused move per week: name the problem you solve, package it into something a buyer can say yes to, open warm conversations, and run the first-client conversation properly. Each week ends with one action step. Do the action steps and the roadmap works. Read it like an article and it won't.

## What the market actually pays

Before the how, the why. These are typical market ranges for senior independent work. Ranges are wide on purpose: rates vary by niche, background, and how consistently the outreach system gets executed.

Role	Typical monthly rate per client
Fractional CFO	\$8,000 to \$25,000
Fractional CMO	\$5,000 to \$15,000
Fractional CTO	\$10,000 to \$30,000
Senior Strategy Consultant (independent)	\$300 to \$600 per hour

Why do companies pay this? Because a full-time CFO costs \$150,000 to \$300,000 in base salary alone, plus benefits, equity, and months of recruiting risk. A fractional expert at \$10,000 a month isn't expensive. It's a bargain. Companies pay these rates because they're cheaper than the alternative.

## WEEK 1

# Name the Problem You Solve

New consultants fail here more than anywhere else, and it's almost always one of two mistakes: going too broad ("I do strategy consulting") or leading with a title instead of a problem. Buyers don't hire titles. They hire people who make a specific, painful, expensive problem go away.

Start with the question that seeds the whole practice: **what is the most expensive problem you have personally solved in your career?** Not your job title. The actual problem. The crisis you managed, the deal you closed, the system you built. Write down ten of them from your last three to five years.

## Score each problem on three axes

This is the Niche Selection Matrix. Score each candidate problem 1 to 10 on each axis and add them up.

Axis	The question it asks
Urgency	Is this keeping someone up at night right now? Not someday. This quarter.
Rarity	How many people could solve this at your level? Not claim to. Actually deliver.
Budget	Does your buyer have money to spend on this? Follow the money.

  

Total score	What it means
21 to 30	Pursue immediately. This is your lane.
15 to 20	Viable, but differentiate hard on your specific credentials.
Under 15	Skip it. You'll spend more energy convincing than delivering.

Your niche is the problem that scores 21 or higher, where your specific experience puts Rarity at 7 or above. Then compress it into one sentence: *"I help [who] solve [specific problem] using [your specific experience]."*

### ACTION STEP

Open a blank document. List 10 specific problems you solved in your career. Score each on Urgency, Rarity, and Budget. Circle the one that scores 21 or higher. That's your niche. Give it 48 hours, not four weeks.

## WEEK 2

# Package One Offer a Buyer Can Say Yes To

"Hire me and I'll help with whatever comes up" is unbuyable. Open-ended feels risky to a buyer. Time-bounded, outcome-defined work feels safe. Your first offer should be a **paid diagnostic**: priced between \$1,500 and \$3,500, delivered in 2 to 4 hours of your time, with a written report as the output.

Why a diagnostic? The risk to the client is low and the signal is high. You're not asking for a long-term commitment. You're offering to show them what you see in their situation, in writing, in a short engagement. The client pays a small amount to evaluate you. You get paid to prove yourself. And almost every diagnostic surfaces problems that convert naturally into a longer conversation.

### WHERE THIS LEADS

The diagnostic is Tier 1 of a three-tier offer stack. Tier 2 is the core monthly engagement (\$3,000 to \$8,000 per month); two clients at \$5,000 a month is a \$10,000 a month baseline. Tier 3 is the full transformation project. Build Tier 1 first. It opens the door to everything else.

## Name it with the formula that converts

[Specific Result] + [For Whom] + [In What Timeframe]

Instead of this	Say this
"Marketing consulting for startups"	"30-Day Customer Acquisition Playbook for B2B SaaS under \$5M ARR"
"CFO advisory services"	"Series A Fundraising Readiness Audit in 3 weeks"
"Operations consulting"	"60-Day Operational Efficiency Roadmap for Mid-Market Manufacturers"

### ACTION STEP

Write your diagnostic offer using the formula: the result it delivers, who it's for, and the timeframe. Price it where a busy VP can approve it without a budget meeting: \$1,500 to \$3,500. It doesn't need to be perfect. It needs to exist on paper this week.

## WEEK 3

# Open 50 Warm Conversations

---

The cleanest path to your first client is not cold outreach. It's warm conversations with people who already know you, already respect your work, and for whom your move into consulting is simply new information they didn't have. You are not selling to these people. You are **updating** them.

Build the Warm 50: a list of 50 people who watched you solve hard problems. Former bosses. Former colleagues. Former clients. Vendors you worked with. Pull from LinkedIn connections, your email history, and your phone contacts.

## The message that works

### THE TEMPLATE

*"Hey Daniel, it's been a while. I was thinking about the quarterly review process we built together at [Company] and realized I never told you how that playbook evolved after you left. I wanted to reach out because I've recently gone independent and I'm taking on consulting work helping SaaS finance teams build out their FP&A infrastructure. If you know anyone navigating that kind of build-out right now, I'd love an introduction. And if there's anything I can do for you, I'm here."*

Four things make this work. It's personal: it references something real you shared. It's specific: it says exactly what you do and for whom (that's your Week 1 sentence). It's not desperate: it doesn't ask anyone to feel bad for you. And it makes one clear ask: an **introduction**, not a job.

### KEY INSIGHT

One warm referral from a trusted mutual connection is worth, conservatively, fifty cold emails. The social proof is built in. The trust transfer is immediate.

### ACTION STEP

Build your Warm 50 list today. Then send the first 10 messages using the template above, personalized with something real. Just 10. Today. Send 10 more each working day this week.

## WEEK 4

# Run the First-Client Conversation

When someone agrees to a call, the biggest mistake is walking in prepared to pitch. Your job on a discovery call is to understand the problem deeply, and then decide whether you want to take it on. That shift in posture changes everything. Structure the 30 minutes in thirds:

Minutes	Your job
1 to 10 <b>Their situation</b>	Ask open questions. Then stop talking. The more they talk, the more they trust you.
11 to 20 <b>Implications</b>	Go deeper than the surface problem. By the end, they've convinced themselves this is urgent. You didn't do that work. They did.
21 to 30 <b>Your take and next step</b>	Offer a brief, confident diagnosis. Propose the natural next step (your diagnostic) with a price, a timeline, and a question.

## Name the price, then stop talking

When they ask what it costs, state the number clearly, then say nothing. *"For this kind of engagement, my fee is \$2,500. That covers the full scope I described."* The silence will feel excruciating. The client is processing. Let them process. The first person to speak after a price is named loses the negotiating position.

## Follow up three times, then stop

Touch	What it does
<b>Day 1</b>	Add one piece of value. Reference something specific from the call.
<b>Day 5</b>	Something relevant and low-pressure: a brief observation or resource connected to their situation.
<b>Day 12</b>	Close the loop. Respect their decision. Keep the door open.

People who weren't ready in week two often come back after message three. The ones who don't were never going to. Three touches and move on.

### \$ THE MONEY

**What the data consistently shows: most senior professionals who execute this outreach system, in a niche with genuine urgency, close their first paying client within 60 days. Plan for the ramp. Month 6 looks very different from Month 1.**

## THE ROADMAP ON ONE PAGE

# Your 30-Day Checklist

---

- Days 1 to 2** Write the 10 most expensive problems you've personally solved. Score each on Urgency, Rarity, Budget. Circle the 21+ winner.
- Day 3** Write your one-sentence niche: I help [who] solve [specific problem] using [your specific experience].
- Days 4 to 7** Draft your paid diagnostic offer with the naming formula. Price it \$1,500 to \$3,500. Write the one-page description of what the buyer gets.
- Days 8 to 10** Build the Warm 50 list from LinkedIn, email, and phone contacts.
- Days 11 to 15** Send 10 warm messages a day, each personalized with something real. All 50 sent by day 15.
- Days 16 to 25** Take every call that comes back. Run the thirds structure. Name your price, then stop talking.
- Days 26 to 30** Run the three-touch follow-up with everyone still deciding. Day 1, Day 5, Day 12. Then move on.

### THE HONEST CAVEAT

Not everyone closes in 30 days, and the ranges in this roadmap are typical market ranges, not promises. What the 30 days reliably produce: a named niche, a priced offer, 50 opened conversations, and practiced first-client calls. That is a working pipeline, and a pipeline is what produces the first yes.

## GO DEEPER

# Where This Roadmap Comes From

---

Everything in these pages is condensed from *From Corporate to Cash: How to turn corporate experience into a \$10K+ consulting practice in 90 days*, the PivotLab playbook. The book walks the full 90 days at working depth: 9 chapters, 23 named frameworks, and the operating details this roadmap only points at.

A few of the things the full playbook covers that this roadmap doesn't:

- The five industry tracks (Finance, Marketing, Legal, Operations, Technology), each scored through the matrix with first-client scenarios
- The complete Three-Tier Offer Stack, including how to scope and price the \$15,000 to \$50,000 transformation tier
- The LinkedIn positioning system: headline rewrite, five-part About section, and the 3-2-1 weekly content strategy
- Running your practice on \$200 a month in software, including the AI workflows that replace the team you no longer have
- The plateau traps that stall practices at month 6, and the retainer stacking model that breaks through them

The book pairs with a 50-asset companion toolkit: the Warm 50 tracker, the full Discovery Call Master Framework, cold outreach sequences, proposal and contract templates, pricing calculators, and the 90-day execution roadmap in spreadsheet form. The frameworks you just read about exist there as fill-in-and-use tools.

### \$ THE MONEY

**Get the playbook and toolkit at [pivotlab.shop](https://pivotlab.shop). One diagnostic client covers it many times over.**

---

THE PIVOT LAB • PIVOTLAB.SHOP