

TURN YOUR EXPERTISE INTO A PRODUCTIZED CONSULTING OFFER

Package your skill into a named, priced, scoped offer

Rick Piña

Year of Discovery coaching notes

8-step playbook

Audit → Sprint → Retainer

Goldmine fold order

Take 10, 20, 30 years of experience and package it into a real consulting offer.

RICK PIÑA COACHING FRAME

INSIDE THIS BOOKLET

1. Problem comparison table
2. Mandatory one-liner
3. 8 steps with pass gates
4. Expertise illustrations
5. Red lines + Goldmine books
6. Worksheet checklist + fill-ins

HOW TO USE

Write the one-liner first. Work steps in order. Each has Do / Deliverable / Pass gate. Illustrations are shape examples, not claimed results. No fake ROI. Intro video is live on the web guide (youtu.be/sud394_J2Xg); this booklet is the printable companion.

GAP

Packaging, not talent

Job title, free tip, or open calendar is not an offer. One buyer. One outcome. One container.

LADDER

Audit → Sprint → Retainer

Paid diagnostic first. Time-boxed Sprint. Retainer only after proof. Never underprice the Sprint.

FROM RICK'S INTRO

Hey, so check this out everybody.

From the intro video.

Listen, in our church business consortium, the one that I am part of with my wife, we have a lot of people that say that they want to be consultants, or maybe they are consultants, but they do not know how to go to market really. How to take their ideas, their experiences, and convert that into a real business. How to take it to market and how to offer it.

So in this post I am walking you through step by step how to take your experience, your ideas, things you have developed 10, 20, 30 years building up, and package that into a real business from a consulting perspective. Check it out. Let's discuss it in the comments. Below is the packaging playbook.

FROM RICK

A lot of the leaders I mentor have the calling. They have the skill. What they do not have yet is a built house. They are running a million-dollar dream inside a tent.

The gap is not talent. The gap is packaging. One clear buyer. One outcome. One delivery container. One price. One yes or no.

Stop renting your brain by the hour. Package a result people can buy. Praise is not validation. A deposit, an intro, or a signed next step is.

RICK PIÑA

SECTION 01 • THE PROBLEM

Free / hourly / soft CTA vs productized

	FREE	HOURLY	SOFT CTA	PRODUCTIZED
Boundary	None	Clock	Vague	Scope + end date
Decision	Gratitude	Compare rates	Delay	Yes/no on outcome
Pricing	\$0	Time	Undefined	Value / dream outcome
Delivery	Chat	Calendar hostage	Maybe	Sprint / audit / cohort
Validation	Compliments	Busy calendar	Ghosting	Deposit / SOW / intro

SECTION 02 • ONE-LINER

MEMBERS MUST WRITE

I help [one buyer] achieve [one outcome] in [time].

No "and" for three audiences. If you need commas for three niches, you have a résumé, not an offer.

IN THIS GUIDE

- 01 Problem comparison

02 Mandatory one-liner

03 Steps 1–4

04 Steps 5–8 + ladder

05 Illustrations + red lines

06 Books + worksheets + close

SECTION 03 • EIGHT STEPS (1-4)

Career capital → Why → Mom Test → Offer MVP

Each step: Do / Deliverable / Pass gate. Aligned to Goldmine fold order.

STEP 01 • SO GOOD THEY CAN'T IGNORE YOU

Inventory career capital

Craftsman mindset: what rare value can you already produce? List skills people ask for, proof points (roles, systems, outcomes), and “stop doing free” triggers. Trade capital for a scoped offer, not a vague passion brand.

DO

Skills + proof + unpaid-ask triggers

DELIVERABLE

Career Capital Sheet

PASS GATE

External proof on ≥1 skill

APPLICATION CHECK

Mission comes from skill unlocking the adjacent possible, not a dream board first.

STEP 02 • START WITH WHY

Write Why → How → What

Why = belief that survives product changes. How = 2-3 process principles. What = the offer container. Lead with Why. Market to people who share it.

DO

One-sentence Why + 2-3 How + draft What

DELIVERABLE

Golden Circle card

PASS GATE

Outsider can repeat your Why

STEP 03 • THE MOM TEST

Run validation interviews

Their life in the problem domain, not your idea. Past behavior only. Sample: “When was the last time you paid (or tried) to solve this?” Deflect compliments. Ask ≥1 invalidating question. Push for commitment (time, intro, deposit). Lukewarm = signal.

DO

5-8 chats; one “When was the last time...?”; facts vs opinions

DELIVERABLE

Interview log + real signals

PASS GATE

Hard truth or commitment, not praise

STEP 04 • THE LEAN STARTUP

Define the offer MVP

Rank leap-of-faith assumptions. Write hypothesis + test plan (metric + kill date). Smallest paid container (2-week diagnostic, fixed audit, 4-call intensive). Measure behavior. Write pivot/persevere criteria on the MVP one-pager. No year-long curriculum first.

DO

Smallest paid container + pivot/persevere criteria on one-pager

DELIVERABLE

MVP one-pager (in/out, hypothesis, test plan)

PASS GATE

Sell & deliver without a course library

Grand Slam → Position → Traction → Ethical close

BOARD LADDER AFTER STEP 5 • PROOF GATES BETWEEN RUNGS

AUDIT **Paid diagnostic**
Fixed fee. Findings + recommendation (answer-first). No free deep-dives.



SPRINT **Time-boxed implementation**
Toward dream outcome. Phase Exit / Acceptance written. Do not underprice to “get the retainer.”



RETAINER **Ongoing only after proof**
Price to outcome value. Written Definition of Done. Evidence, not hope.

STEP 05 • \$100M OFFERS

Build the Grand Slam Offer

Market with pain + purchasing power + reachability. Specific dream outcome. Value Equation. Obstacle → named solution. Classify delivery vehicles (cost vs value) before trim-and-stack; name each bundle. **First-price / Sprint-floor:** price from paid-pilot clears + outcome value (cost of unsolved problem), not hourly comfort. Premium + guarantee + terms.

ENGAGEMENT DEFINITION / SOW

- Problem question • Decision maker • Success metric • Time box
- Audit = findings + recommendation (answer-first) • Sprint Phase Exit / Acceptance • Definition of Done
- Hypothesis + test plan from Step 4

DO
Classify vehicles; stack; SOW; Sprint-floor price

DELIVERABLE
Stack sheet + price + SOW

PASS GATE
Stranger knows result, time, failure terms

STEP 06 • OBVIOUSLY AWESOME

Position the category

Alternatives → unique capabilities → value in customer language → best-fit customer → category → strategy. Rewrite first 30 seconds with SCR (Situation, Complication, Resolution) before features.

DO
Positioning stack + SCR opening scene

DELIVERABLE
Positioning brief + 30-sec SCR opening

PASS GATE
Framed vs right alternative, not commodity “coach”

STEP 07 • TRACTION

Pick one channel and test

Bullseye brainstorm. 1-2 cheap inner-ring tests with metrics (warm intros, speaking, niche content, ministry or federal IT networks). Focus on traction; keep one backup under test.

DO
Inner-ring tests + kill date

DELIVERABLE
Channel test card

PASS GATE
Written kill/scale criterion, not post-and-pray

STEP 08 • INFLUENCE + EGO IS THE ENEMY

Sell ethically + stay student

1–3 true Influence principles (reciprocity, commitment, peer proof, earned authority, real scarcity only). Weekly ego check: ship work, invite hard feedback, no myth-polishing. “Maybe later” does not count.

DO

Ethical checklist. Weekly student log: one unflattering feedback + one unglamorous ship

DELIVERABLE

Sales checklist + paid yes or BATNA walk

PASS GATE

Written-scope paid engagement or clean no

APPLICATION CHECK

Replace “prove I’m special” with “what is the next right task?” Ship the unglamorous MVP.

SECTION 04 • STARTER ILLUSTRATIONS

What productizing can look like

Shape examples for a worksheet checklist, not invented ROI, client names, or revenue claims. Plug in your proof.

WORLD	LIVED EXPERTISE (SEED)	EXAMPLE PRODUCTIZED SHAPE
Ministry teaching	Teaching, discipleship, sermon/series structure	90-day teaching series architecture or volunteer onboarding sprint
Ministry ops	Events, communications, logistics	Ministry event ops playbook install (checklist + 2 sessions)
Federal IT	Contracting context, renewals. Name mission, buyer (funds), authority (obligates). Ethics red line.	Capture readiness diagnostic (review + gap list + readout)
Military	Discipline, leadership under constraint, AARs. Name mission, buyer (pays), authority (approver). Ethics red line.	First-90-days leadership OS for new supervisors
Family systems	Spouse discovery, rhythms, parenting systems	Family operating cadence install (agenda + 4-week habits)
Teaching	Curriculum, classroom systems	Classroom systems install for first-year teachers
Sales	Pipeline, discovery, close process	Discovery-call OS rebuild (audit + 2-week sprint)
HR	Onboarding, performance rhythms	30-60-90 onboarding playbook install
Fitness	Programming, habit coaching	12-week foundation program (named container)
Real estate	Buyer/seller process, local systems	First-time seller readiness diagnostic

HARD RULE
Do not invent client names, dollar figures, or “we 10x’d X.” Meta-example: this package itself is a named guide with steps, not “email me anytime.”

Same playbook. Different career capital. Your proof goes in the blanks.

SECTION 05 • RED LINES

Failure modes & when NOT to productize yet

Board overlay: free advice without a paid rung is a trap. Proof before scale.

FAILURE MODES TO REFUSE

- **Free deep-dives** that never become a paid Audit / Sprint rung.
- **Fear pricing** (hourly comfort) instead of outcome pricing.
- **Selling hours** instead of outcomes.
- **Helping everyone**: no one buyer, no one outcome.
- **Content with no ask**: posts without a named next step.
- **Fake scarcity / fake testimonials / invented case-study numbers**.
- **Employment / ethics**: Active duty, federal employee, or contractor: check moonlighting/conflict rules before you sell. Never use nonpublic gov info, employer IP, or employer time.

01

Can't name buyer + outcome

If the one-liner still has “and” for three audiences, stay in Mom Test + Lean pilots.

02

Can't deliver a fixed Sprint

If you cannot time-box delivery, you do not have a productized container yet.

03

Never done the work for pay

Even once. Run 3–5 paid pilots before branding a “program.”

04

Can't measure the result

If success is vibes-only, rewrite the dream outcome until it is observable.

When in doubt: 3–5 paid pilots with Mom Test + Lean gates before you brand a program.

BOARD OF ADVISORS OVERLAY

ALSO REFUSE

Quitting for a vague passion brand before excellence is visible. Pitching then fishing for “sounds great.” Building a year of content in stealth. Competing on hourly rate. Fake FOMO seats.

SECTION 06 • GOLDMINE

Books that sharpen this

Cite titles. Teach the move. Do not paste copyrighted text.

01 • CAREER CAPITAL FIRST

So Good They Can't Ignore You: Inventory rare skill and external proof before inventing a passion brand.

02 • BELIEF BEFORE FEATURES

Start With Why: Why → How → What so the pitch leads with belief.

03 • VALIDATE WITH BEHAVIOR

The Mom Test: Past behavior and commitment signals; compliments are noise.

04 • MVP THE OFFER

The Lean Startup: Smallest paid container; pivot or persevere on evidence.

05 • GRAND SLAM STACK

\$100M Offers: Dream outcome, Value Equation, trim-and-stack, premium + guarantee. Audit → Sprint → Retainer.

06 • CATEGORY CONTEXT

Obviously Awesome: Alternatives → capabilities → value → best-fit → category. Rewrite opening scene.

07 • ONE CHANNEL

Traction: Bullseye one channel with a kill/scale criterion.

08 • ETHICAL PERSUASION

Influence: Only principles that stay true if inspected. No fake scarcity.

09 • STUDENT MINDSET

Ego Is the Enemy: Ship the unglamorous MVP; stay sober after wins; extract lessons after flops.

OPTIONAL CLOSE LENSES

Getting to Yes

Never Split the Difference

Atomic Habits

Made to Stick

SECTION 07 • WORKSHEETS

Fill these before you sell

WORKSHEET CHECKLIST

- ☐ Career Capital Sheet: skills / proof / unpaid-ask triggers (Step 1)
- ☐ Golden Circle card: Why / How / What (Step 2)
- ☐ Mom Test script: hard-question bank + interview log (Step 3)
- ☐ Offer MVP one-pager: buyer, outcome, in/out, hypothesis, test plan, pivot/persevere (Step 4)
- ☐ Value Equation + stack: Grand Slam + Sprint-floor + SOW (Step 5)
- ☐ Positioning brief: question stack + 30-second SCR opening (Step 6)
- ☐ Channel test card: hypothesis, spend/time, metric, kill date (Step 7)
- ☐ Influence + ego checklist: ethical persuasion + weekly student log (Step 8)

MINIMAL FILL-IN BLANKS

One-liner	I help _____ achieve _____ in _____.
Capital	Skill: _____ Proof: _____ Unpaid ask: _____
MVP in/out	In: _____ Out: _____ Pivot if: _____ Persevere if: _____
Hypothesis	We believe _____. Know by _____ (metric / kill date).
Audit → Sprint	Audit: _____ Sprint: _____ Exit/DoD: _____
SCR	S: _____ C: _____ R: _____
Ethics	Role (AD/fed/contractor/other): _____ Moonlighting cleared?: _____

SECTION 08

What did you get?

You got a clear contrast between free advice, hourly coaching, soft CTAs, and a productized consulting offer. You got a mandatory one-liner. You got eight steps with Do / Deliverable / Pass gates, from career capital through ethical close, including the Audit → Sprint → Retainer ladder. You got starter illustrations across ministry, federal IT, military, family, teaching, sales, HR, fitness, and real estate (shape examples, not fake results). You got red lines and when not to productize yet. You got Goldmine books tied to teaching moves, and a worksheet list.

Write the one-liner this week. Run Step 1 and Step 3 before you build a curriculum. If you cannot name one buyer and deliver a fixed Sprint, stay in paid pilots.

Let's discuss this in the comments. I love you.

DO

This week

Write the one-liner. Fill Career Capital Sheet. Book 5 Mom Test conversations. Draft Offer MVP one-pager.

DON'T

This week

Build a 12-week course. Invent testimonials. Underprice a Sprint to "get" a retainer. Help everyone.

Take your experience and package it into a real consulting offer. Let's discuss it in the comments.

YEAR OF DISCOVERY

GREATER IS COMING

RICK