



Welcome to the

# *SUCCESSFUL SECURITY CONSULTING*

Presented by

International Association of Professional Security Consultants



Tuesday, March 28, 2023

Timeframe	Session	Subject
8:30 AM	<b>Intro</b>	<b>Welcome &amp; Introductions</b>
8:45 AM	<b>Session 1</b>	<b>The Business of Security Consulting</b>
9:15 AM	<b>Session 2</b>	<b>Establishing and Operating a Consulting Practice</b>
10:30 AM		<b>BREAK</b>
10:45 AM	<b>Session 3</b>	<b>Security Consulting Practice Areas</b>
12:00 PM		<b>LUNCH</b>
1:00 PM	<b>Session 4</b>	<b>Getting Business &amp; Attracting Clients</b>
2:00 PM	<b>Session 5</b>	<b>Executing a Consulting Assignment</b>
3:00 PM		<b>BREAK</b>
3:15 PM	<b>Session 6</b>	<b>Avoiding Common Mistakes &amp; Pitfalls</b>
4:00 PM	<b>Session 7</b>	<b>Summary &amp; Wrap-Up</b>



# Session 1: Welcome and Introductions





# Your Instructors & Guest Speaker



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## Today's Sessions

- **The Business of Security Consulting**
- **Establishing and Operating a Consulting Practice**
- **Security Consulting Practice Areas**
- **Getting Business and Attracting Clients**
- **Executing a Consulting Assignment**
- **Avoiding Common Mistakes and Pitfalls**
- **Summary and Wrap-Up**

Career	Description	Required Education	Required Experience	Average Annual Salary (2023-2024 Estimate)
<b>Security Analyst</b>	Plan and execute procedures to protect networks and systems from cyberattacks.	Bachelor's degree; some employers prefer a master's	Some related experience	\$73,140
<b>Security Engineer</b>	Seek out vulnerabilities, configure firewalls, and write scripts to respond to incidents.	Bachelor's degree; some employers prefer a master's	1-5 years of IT experience	\$94,790
<b>Incident Responder</b>	Assess and respond to cybersecurity threats using network forensics and penetration testing.	Bachelor's degree; some employers prefer a master's	Some related experience	\$85,080
<b>Security Architect</b>	Design, program, and install systems and applications to maintain and improve IT security.	Bachelor's degree; some employers prefer a master's	5-10 years of IT experience	\$125,350
<b>Chief Information Security Officer (CISO)</b>	Manage IT security teams, budgets, policies, and practices.	Bachelor's degree; many employers prefer a master's	5-10 years of IT experience	\$165,160
<b>Chief Security Officer (CSO)</b>	Oversee all aspects of physical, cyber, and operational security for the organization, including risk management and compliance.	Bachelor's degree; many prefer master's or MBA	10+ years in security leadership	\$180,000 - \$250,000
<b>Physical Security Head</b>	Lead physical security programs, including facility protection, guard force operations, access control, and executive protection.	Bachelor's degree; relevant certifications preferred	10+ years in physical security	\$130,000 - \$180,000
<b>Security Consultant (Entry-Level)</b>	Assist clients with risk assessments, system designs, and basic security planning.	Bachelor's degree or relevant certifications	0-3 years of experience	\$65,000 - \$85,000
<b>Security Consultant (Mid-Level)</b>	Advise clients on security strategies, system upgrades, and compliance programs.	Bachelor's degree; certifications (CPP, PSP) preferred	4-7 years of experience	\$85,000 - \$120,000
<b>Security Consultant (Senior/Principal)</b>	Lead complex security assessments, advise executive leadership, and develop enterprise-level security programs.	Bachelor's or master's degree; certifications required	8-15+ years of consulting experience	\$120,000 - \$175,000



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# What is an “Independent Security Consultant”

***An independent, non-product affiliated professional that provides unbiased security expertise, advice, information, and recommendations to clients for an agreed upon consulting fee. An independent security consultant does not profit, monetarily or otherwise, from purchases made by clients.***

# What is an “Independent Security Consultant”

An independent security consultant **does not**:

- ✓ Sell or install security products or non-consulting services
- ✓ Conduct private investigations
- ✓ Provide executive protection, patrol, or security guard services
- ✓ Conduct background screening, honesty tests, or drug tests
- ✓ Accept commissions or referral fees



# What is an “Independent Security Consultant”

- Most people in the industry that call themselves “Security Consultants” are in fact sellers of security products or services
- The term “Independent Security Consultant” was coined to distinguish true consultants from those who are actually salespeople


# The Need for Independent Security Consultants

- **Businesses, organizations, and government agencies of all types regularly need the services of independent security consultants**
- **Reasons for hiring independent consultants include:**
  - ✓ **Client lacks in-house security expertise**
  - ✓ **Specialized skills, tools, knowledge or credentials are required**
  - ✓ **Client's in-house security team too busy to perform task**
  - ✓ **Objective, unbiased outside opinion is wanted**
  - ✓ **Independent audit required by regulatory body**



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A person in a suit stands in a modern office with large windows overlooking a city and mountains. The scene is dimly lit, with the primary light source being the natural light from the windows, which creates a silhouette effect on the person and the office furniture. The text is overlaid in the center of the image.

# Session 2: Establishing and Operating a Consulting Practice



# Introduction

There are a lot of behind the scene activities that go into starting and maintaining a consulting practice.

It helps if you can multitask...

Prepare to wear many hats!



# Legal Structure

- Corporate Structure
  - Dba
  - Corporation – S or C
  - LLC
- If you know what you are doing, business can be formed on-line, or (recommended):
  - Engage a Business or Tax Lawyer



# BUSINESS LICENSE

## Licensing

- Nevada and Virginia Require Security Consultants to be have special license
- If you plan to perform projects in these states, you will need to:
  - Become Licensed
  - Team with a consultant who is licensed
- Licensing data below is current as of August 2018 and subject to change; check State web site.



State	Types of License	Costs	Exam	Continuing Ed	Annual Costs
Nevada	<ul style="list-style-type: none"> <li>• <a href="http://www.pilb.nv.gov">www.pilb.nv.gov</a></li> <li>• PILB stands for Private Investigator's Licensing Board.</li> <li>• NRS 648.060</li> <li>• Private Investigator or Private Patrolman</li> <li>• License number must be printed on all print material, website, and business cards.</li> </ul>	<ul style="list-style-type: none"> <li>• \$20.00 application fee.</li> <li>• \$100.00 exam fee.</li> <li>• \$750.00 background investigation fee.</li> <li>• 1<sup>st</sup> exam fee is covered in application fee.</li> <li>• \$100.00 if need to retake the exam.</li> </ul>	<ul style="list-style-type: none"> <li>• Given 4 times per year. (January, April, July, October)</li> <li>• Scheduled by PILB to take exam, will grade it in front of you. Exam in Carson City or Las Vegas.</li> <li>• Exam is closed book - 50 true/false, multiple choice, and fill in the blank questions. A score of 75% or greater is required to pass.</li> <li>• If pass, must return to Carson City or Las Vegas and sit before PILB for questioning. They will tell you there if you are accepted for licensing.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• \$500.00 annual license fee.</li> <li>• \$100.00 annual abeyance fee.</li> <li>• License expires on June 30 of each year.</li> <li>• You can reapply for your license between May 15 and June 30 of each year.</li> </ul>

State	Types of License	Costs	Exam	Continuing Ed	Annual Costs
Virginia	<ul style="list-style-type: none"> <li>• <a href="http://www.dcjs.virginia.gov">www.dcjs.virginia.gov</a></li> <li>• If your company designs or consults in the design of any electronic security equipment to an end user, you must be licensed in the state to do business.</li> <li>• License number must be printed on all material, website, and business cards.</li> </ul>	<ul style="list-style-type: none"> <li>• \$900.00 application fee.</li> <li>• \$50.00 Compliance Agent application fee.</li> <li>• \$325.00 one-time fee for a Certificate of Authority to conduct business.</li> <li>• 1st exam fee is covered in application fee.</li> <li>• No cost if need to retake the exam but must take it at their Richmond office.</li> <li>• Fail the retest, must complete all initial training requirements to include application, fees, and entry level training.</li> </ul>	<ul style="list-style-type: none"> <li>• Must be scheduled by VA Department of Criminal Justice Services for a 6 hour on-line training course learning to navigate Code of VA and Regulations relating to private security services.</li> <li>• Two hour on-line test. A score of 80% or greater is required to pass.</li> </ul>	<ul style="list-style-type: none"> <li>• 8 hours every two years and you must take it through a Virginia approved vendor.</li> <li>• Average cost \$50.00.</li> </ul>	<ul style="list-style-type: none"> <li>• \$112.64 annual registration fee.</li> <li>• \$500.00 annual business renewal fee.</li> <li>• \$25.00 bi-annual compliance agent renewal fee.</li> <li>• Must file annual report (unsure of cost since tied into tax filings).</li> </ul>



# Insurance Needs

- State & Federal Disability Insurance
- Workers Compensation
- General Liability Insurance
- Errors & Omissions (Professional Liability)
- Vehicle (Auto)
- Property (Business Papers, PCs, Printers)
- Medical/Dental





# Finance & Accounting

- Planning
  - Pro-forma P&L, Cash Flow
  - Cash or Accrual Basis
  - Initial Investment/Break Even Point
- Estimated Franchise & Income Tax Payments
- Quarterly Payroll Liability Reports
- Recordkeeping
- Tax Filing



# Banking Services

- Establish and Maintain:
  - Checking and Savings Accounts
  - Credit Card Accounts
  - Credit Lines



# Bookkeeping

- Establish and Manage Recordkeeping System/ Software – Peachtree, QuickBooks
- Invoicing (biweekly, monthly)
- Receipts (check deposits, EFT)
- Post & Pay Expense Bills
- Calculate Payroll and Issue Pay/Liabilities
- Bank Account Reconciliation





# Performance Metrics

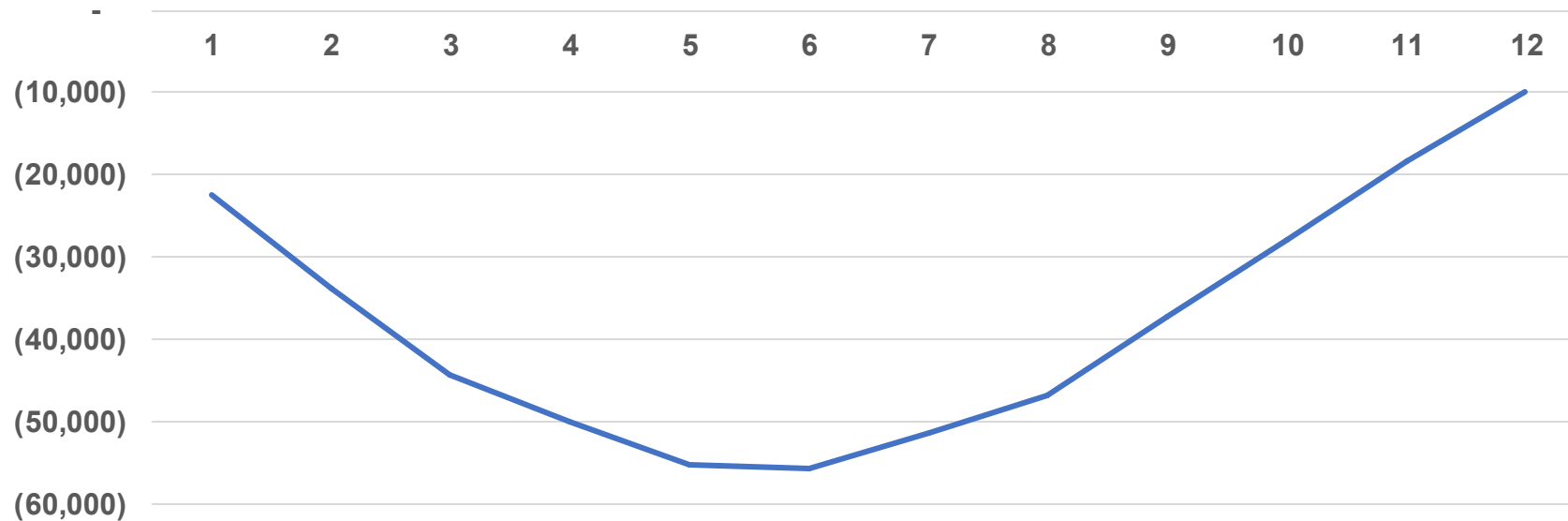
- ✓ Financial
  - ❖ Cash Flow, A/R, A/P, BS, P&L
- ✓ Marketing
  - ❖ Leads, Proposals, Sales
- ✓ Project Accounting
  - ❖ Time Costs, Project Expenses

# Monthly Expenses

EXPENSE CATEGORIES	MONTH												ANNUAL
	1	2	3	4	5	6	7	8	9	10	11	12	
Software (Applications, Security)	2,000												2,000
Dues/Subscriptions (IAPSC, Publications)	200	200	200	200	200	200	200	220	220	240	220	200	2,500
Equipment Rental/Lease	150	100	100	100	100	100	100	100	100	100	100	100	1,250
Insurance (Med., Gen. & Prof. Liability)	4,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	15,000
Interest Expense	40	40	40	40	40	40	40	40	40	40	40	60	500
Office H/W (Furniture, Computers)	2,000	1,000											3,000
Office Supplies	400			200			200			200			1,000
Payroll (Support Staff)	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	15,000
Payroll (Consultant)	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	60,000
Postage/Delivery (Stamps, FedEx)	90	60	60	60	60	60	60	60	60	60	60	60	750
Printing and Reproduction	100		100			100			100			100	500
Professional Fees (Legal, A/C)	1,000											1,000	2,000
Promotion (Web, Brochure, Ads)	3,500												3,500
Rent (incl. Utilities)	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	12,000
Taxes (Corporate, Payroll)	500	500	500	500	500	500	500	500	500	500	500	500	6,000
Telephone (Fax, Phone, ISP)	200	200	200	200	200	200	200	200	200	200	200	200	2,400
Travel & Ent. (Mark'g, Prof. Devt)	850	850	800	850	800	850	800	850	800	850	850	850	10,000
Other.....	200	200	200	200	200	200	200	200	200	200	200	200	2,400
<b>TOTAL EXPENSES (w/ Payroll)</b>	<b>22,480</b>	<b>11,400</b>	<b>10,450</b>	<b>10,600</b>	<b>10,350</b>	<b>10,500</b>	<b>10,550</b>	<b>10,420</b>	<b>10,470</b>	<b>10,640</b>	<b>10,420</b>	<b>11,520</b>	<b>139,800</b>

# Cumulative Cash Flow

MONTH	1	2	3	4	5	6	7	8	9	10	11	12	ANNUAL
Proposals	10,000	20,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	330,000
Sales (Converted Proposals)		5,000	5,000	10,000	15,000	15,000	20,000	20,000	20,000	20,000	20,000	20,000	170,000
Accrued Income (Billings)			5,000	5,000	10,000	15,000	15,000	20,000	20,000	20,000	20,000	15,000	145,000
CASH INCOME (Receipts)				5,000	5,000	10,000	15,000	15,000	20,000	20,000	20,000	20,000	130,000
TOTAL EXPENSES (w/ Payroll)	22,480	11,400	10,450	10,600	10,350	10,500	10,550	10,420	10,470	10,640	10,420	11,520	139,800
PROFIT (LOSS) (Cash Basis)	(22,480)	(11,400)	(10,450)	(5,600)	(5,350)	(500)	4,450	4,580	9,530	9,360	9,580	8,480	(9,800)
CUMULATIVE CASH FLOW	(22,480)	(33,880)	(44,330)	(49,930)	(55,280)	(55,780)	(51,330)	(46,750)	(37,220)	(27,860)	(18,280)	(9,800)	



# Sales Metrics

## Proposal/Sales Log

Log

Last Update: 5/18/2015		QTY.	YTD Proposals		YTD Sales		YTD Win Ratios		Proposer (S#1 or S#2)	New or Add
Proposal Backlog: \$ 8,500.00		\$ Value	43,700		49,800		113.96%			
		\$ Ave.	21,850		24,900		113.96%			
		Sales#1	35,200		49,800		141.48%			
		Sales#2	8,500		0		0.00%			
NEW PROJECTS	QTY.	0		1		#DIV/0!				
	\$ Value	0		17,600		#DIV/0!				
	\$ Ave.	#DIV/0!		17,600		#DIV/0!				
	% of total Qty/Value	0% 0%		50% 35%						
ADDITIONS to EXISTING PROJECTS	QTY.	1		1		100.00%				
	\$ Value	35,200		32,200		91.48%				
	\$ Ave.	35,200		32,200		91.48%				
	% of total Qty/Value	50% 81%		50% 65%						
ion	Lead	Quals.	Prop.	Prop.	Sale	Sale	Comments			
ght Click	Source	Date	Date	\$	Date	\$				
	Security Director		10/27/14	17,600	05/18/15	17,600	+\$2kREXP		S#1	N
	IAPSC		12/29/14	97,600	--	--	Lost to LMN Consulting		S#2	N
	Consulting Team	01/15/15	02/02/15	35,200	03/30/15	32,200	Discounted by \$3k		S#1	A
	Architiect		02/18/15	8,500					S#2	



# Project Accounting

## PROJECT STATUS

YEAR 2015

Current Projects:

14,80097115,7714,57111,200.0099,20084,400							Mnth:	8	4,800.00	0.00	4,800.00			0.00	Today: 08/19/18		
Next Inv #: 13977							Year:	2015	11,200.00	0.00	11,200.00			0.00	Last Mod: 08/25/15		
Total Fee	Total Non-	Total	Total	A/R	Fee	Unbilled	% Fee	Inv.	Fee	Non-Fee	Invoice	Invoice	Age	Amount	Deposit	Invoice	Remarks
Billed	Fee Billed	Billed	Receipts	Balance	Budget	(Backlog)	Billed	No.	Amount	Amount	Total	Date		Received	Date	Balance	

								inv-no	Fee	non-fee	inv-tot	inv-date	dep	dep-date			
<b>ABC Corp - High Rise</b>																	
LS+REXP ABC-04 DGA 08/12								13301	1,600.00	970.84	2,570.84	10/31/12	54	2,570.84	12/24/12	0.00	KO Meeting
10,000.00	970.84	10,970.84	4,570.84	6,400.00	94,400	84,400	11%	13336	1,200.00		1,200.00	01/31/13	230	1,200.00	09/20/13	0.00	Garage security issues
Prelim Consulting	8,000.00			3,600.00			45%	13374	400.00		400.00	05/31/13	120	400.00	09/30/13	0.00	Garage elevator options
Program & SD	12,800.00			6,400.00			50%	13385	400.00		400.00	06/30/13	80	400.00	09/20/13	0.00	Garage elevator options
Design Development	19,200.00						0%	13976	6,400.00		6,400.00	02/28/15	###			6,400.00	Report Preparation
Construction Docs	22,400.00						0%										
Procurement Support	6,400.00						0%										
Construction Admin	25,600.00						0%										
	94,400.00			10,000.00			11%										
REXP Travel NTE	26,000.00																
<b>PQR Research Inc - Study</b>																	
LSindREXP PRI-01 FGR 08/15								13534	4,800.00		4,800.00	08/25/15	###			4,800.00	Complete
4,800.00	0.00	4,800.00	0.00	4,800.00	4,800	0	100%										

## COMPLETED PROJECTS

<b>XYZ Insur.- Policies/Procedures</b>																	
TC+REXP XYZ-05 KHV 04/11								13082	3,800.00		3,800.00	04/30/11	36	3,800.00	06/06/11	0.00	P&P Std & 2 docs
18,400.00	0.00	18,400.00	18,400.00	0.00	18,800	400	98%	13091	5,800.00		5,800.00	05/31/11	29	5,800.00	06/29/11	0.00	New Policies
								13104	2,400.00		2,400.00	06/30/11	14	2,400.00	07/14/11	0.00	Revise Policies
								13476	6,400.00		6,400.00	07/31/14	11	6,400.00	08/11/14	0.00	Rev&Up date P&Ps

# Office Location

## Home

- ✓ Convenience
- ✓ Free/Low Cost
- ✓ Tax Advantages
- ✓ Minimal Risk – No Lease/Contract
- ✓ More Time with Family
- ✓ Zoning Laws
- ✓ Need Dedicated Space
- ✓ You Need Discipline and Motivation

## Commercial Space

- ✓ Typically More Conducive Work Environment
- ✓ Many Options (locations, sizes, etc.)
- ✓ More Expensive
- ✓ Fewer Distractions
- ✓ More “Professional”
- ✓ Address



# Office Essentials

- ✓ Chair
- ✓ Desk
- ✓ Worktables
- ✓ File cabinets
- ✓ Book Shelves
- ✓ Supply Storage
- ✓ Telephones (VoIP)/Cell
- ✓ Voice Mail/Answering Service
- ✓ Computer
- ✓ Multifunction Copier
- ✓ Security – Alarm System, Fireproof Safe, Document Shredder





# Professional Support

- ✓ **Attorney**
  - Trademark, Copyright and other protection service
  - Litigation Assistance
  - Standard Client Contracts and Agreements
- ✓ **Accountant/Tax Professional**
- ✓ **Insurance Agent**
- ✓ **Financial Planner**
  - Retirement Strategy and Funding
  - Small Business Loan vs. Bank Line of Credit
  - Mergers/Acquisitions/Sale of Business



# Professional Support

## ✓ IT Support

- Computer and Peripheral Devices – Purchase/Installation/Maintenance/Repair/ Replacement [Staples (EasyTech) and Best Buy (Geek Squad)]
- Application Software (Word, Excel, Adobe, etc.)
- Internet Services – high speed?
- Phone Services – VoIP, bundled w/cable
- Back-up Services – Dropbox, Cloud



# Professional Support

- ✓ **Web & Graphics Design**
  - Domain Name Registration(s)
  - Website Design, Hosting and Maintenance
  - Logo Design
  - Website Optimization
  - Email Services
- ✓ **“Stationary”**
  - Letterhead, Envelopes, Business Cards, Brochures





# The Consulting Process

- ✓ Project Lead
- ✓ Qualification
- ✓ Propose Scope of Services and **COMPENSATION**
- ✓ Win Contract/Purchase Order
- ✓ Perform the Scope of Work
- ✓ **INVOICE** for Services
- ✓ **COLLECT / RECEIVE** Payment
- ✓ Buy the Car!

# What Fee Do You Charge?

## What is your cost basis?

# Hourly Costs

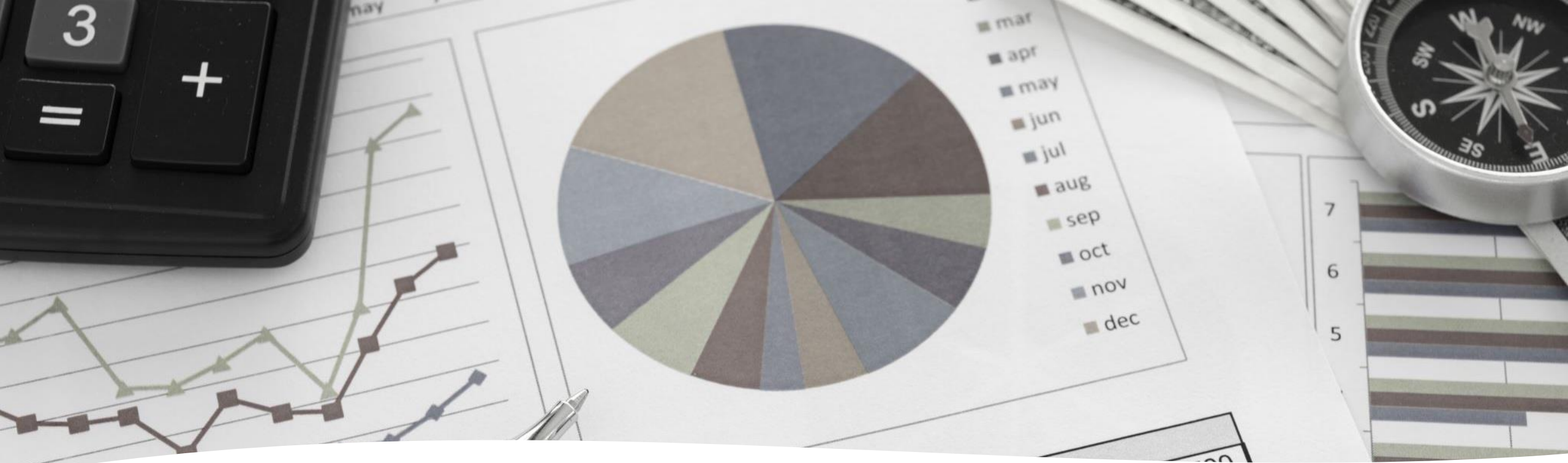
HOURLY COST RATE (\$/HR)

=

EXPENSES (incl. SALARY)

BILLABLE HOURS





# Salary

**Gross Pay  
(Draw against Profit)**

**Assume \$75,000 p.a.**

# Annual Business Expenses

<b>Computer Software</b> (Applications, Security)	2,000
<b>Dues/Subscriptions</b> (IAPSC, CSC, Publications)	2,500
<b>Equipment Rental</b> (Leases: e.g., Copier, PC)	1,250
<b>Insurance</b> (Medical, Gen. & Prof. Liability, WC)	15,000
<b>Interest Expense</b>	500
<b>Office Hardware</b> (Furniture, Computers)	1,750
<b>Office Supplies</b>	1,000
<b>Payroll</b> (Support Staff)	15,000
<b>Postage and Delivery</b> (Stamps, FedEx, UPS)	750
<b>Printing and Reproduction</b>	500
<b>Professional Fees</b> (Legal, Accounting)	2,000
<b>Promotion</b> (Web, Brochure, Ads, Bus. Card)	3,500
<b>Rent</b> (incl. Utilities)	9,000
<b>Taxes</b> (Corporate, Property)	2,500
<b>Telephone</b> (Fax, Phone, ISP)	2,400
<b>Travel &amp; Ent.</b> (Marketing, Professional Devt)	10,000
<b>Other.....</b>	2,350
<b>TOTAL (annual)</b>	<b>\$72,000</b>



# **Billable Time**

**Working time available to be  
billed to a Client**



# Available Hours per Year

- Assuming 8 hour day and 5 day week
- 1 year = 52 x 5 x 8 hours = **2,080 hours**
- Less: Vacation (3 weeks) = 120 hours
- Sick Days (1 week) = 40 hours
- Marketing/Sales (10%) = 208 hours
- Admin. (2 days/month) = 192 hours
- Professional (1 day/mo) = 96 hours
- Unbillable ( " ) = 96 hours
- TOTAL UNBILLABLE = **752 hours**
- **TOTAL BILLABLE TIME = 1,328 hours p.a.**



# Guide to Hourly Cost

**EXPENSES + SALARY**

---

**BILLABLE HOURS**

**\$72,000 + \$75,000**

---

**1,328**

**=**

**\$110.69/hour**

# Fee Variables

- ✓ Experience
- ✓ Renown
- ✓ Niche/Competition/Market Forces
- ✓ Type of Service
  - Design / Consulting / Expert
- ✓ Government Agency Multipliers
- ✓ Lost Leader (potential follow on work)
- ✓ How Hungry are you?
- ✓ Bragging Rights

- **YOU ARE WORTH WHAT**
- **SOMEONE IS PREPARED TO PAY FOR YOU!**



# Proposal: Fee Compensation

## Components

- Fees
- Reimbursable Expenses (REXP)





# Compensation Components

## FEES

- Retainer
- Time Card (Hourly/Daily Rate):
  - Open
  - Estimated or Fixed Cap
- Firm Fixed Price (Lump Sum):
  - Incl./Excl. REXP



# Compensation Components

- **EXPENSES**
  - Travel & Subsistence
  - (Reports, Prints)
  - (Telephone, Fax)
  - Sub-Consultants
- **Discuss fee components with client**
- **before sending proposal!**



# Invoicing


---

- **FREQUENCY**

- Weekly - Bi-weekly - Monthly
- Milestones

- **REXP**

- At Cost
- Administrative/Profit Mark-up

A hand is pointing at a tablet screen that displays an invoice. The invoice is for a 'Health Service' and includes a table of items with their unit prices and total prices. The background is a blurred image of a wooden desk and some greenery.

Sheet Name: Y  
10000 City Name  
Tel: 0000 5555555  
E-Mail: emailname@server.com

Invoice No:  
2011042401

Date:  
24.04.2011

Client name-in:  
Your Name

Dear Mr. Client Name  
We have issued to you following Invoice

Item	Unit Price	Price
Background	2.50 €	273.11 €
Photo License for Certificates	16.80 €	83.16 €
		20.00 €
		273.11 €
		51.80 €
		325.00 €



# Invoicing Format

## **GOLDEN RULE:**

- **He who has the GOLD makes the Rules!**
- Percentage Completion OR Hours x Rates + Time Sheets
- Description of Work Performed
- Financial Status of Project
  - Discuss with Client before Submitting
  - Determine Addressee & Copies



AGGLETON & ASSOCIATES, INC.  
420 S. Riverside Ave, #270  
Croton on Hudson, NY 10520

INVOICE # 13246

Date: 07/26/12

Project: Building Lobby Security Design

For: Security Consulting Services  
Period: 06/26/12 to 07/26/12

Terms: Net 30

To: ABC, LLC  
Attn: Mr. James Dandy  
123 Main Street  
Anytown, DC

Our Ref: MPS-03  
Your Ref: P.O.# 12345678

Task	Task Fee Budget (\$)	Percent Billed		Billings (\$)		Unbilled Fee
		This Period	To-Date	This Period	To-Date	
Planning and Concept Report	4,800.00		100%		4,800.00	-
Construction Documents	6,400.00	100%	100%	6,400.00	6,400.00	-
Procurement Support	1,600.00				0.00	1,600.00
Shop Drawing Review/RFIs	3,200.00				0.00	3,200.00
Acceptance Testing	3,200.00				0.00	3,200.00
Project Fees	19,200.00	33%	58%	6,400.00	11,200.00	8,000.00
Reimbursable Expenses					342.30	
<b>TOTAL THIS INVOICE</b>				<b>6,400.00</b>		

**BILLING COMMENTS:**

Please make check payable to Aggleton & Associates, Inc.

Prepare & Issue Turnstile Plans & Specification

STATEMENT as of: 07/26/12									
Invoice #	Invoice Date	Age	Invoice Amount (\$)			Receipts		Balance Due	Status
			Project Fee	Expenses	Total	Amount	Date		
SUMMARY TO-DATE			11,200.00	949.50	12,149.50	5,749.50	---	6,400.00	---
13240	06/25/12	21	4,800.00	949.50	5,749.50	5,749.50	07/16/12	0.00	Paid, Thank You
13246	07/26/12	0	6,400.00		6,400.00			6,400.00	Current

EIN 11-3310243 Voice 914/524-4110 Fax 914/524-4115 security@aggleton.com



AGGLETON & ASSOCIATES, INC.  
505 White Plains Road, Suite 204  
Tarrytown, NY 10591

INVOICE # 13226

Date: 05/03/12

For: Security Consulting Services  
Period: 05/01/12 to 05/03/12

Project: SMP Implementation: Security Systems

Terms: net 30  
Our Ref: PMI-03  
Your Ref: Our Proposal 3/24/11  
Approved 4/12/11

To: Brian H Jones  
Mutual Endeavor Company  
One Alien Way  
New Town, NY 13579

Task	Hourly Rate (\$)	Budget Hours	Fee Budget (\$)	Level of Effort (Hrs) This Period	To-Date	Billings (\$) This Period	To-Date	Unbilled Fee
Construction Documents	200.00	88	17,600.00		88		17,600.00	0.00
Procurement Support	200.00	24	4,800.00		24		4,800.00	0.00
Bidder Presentations	200.00	8	1,600.00		8		1,600.00	0.00
Construction Administration	200.00	72	14,400.00	7	72	1,400.00	14,400.00	0.00
<b>Project Fees</b>			38,400.00	7	192	1,400.00	38,400.00	0.00
<b>Reimbursable Exp's</b>			3,400.00			184.85	1,252.02	2,147.98
<b>TOTAL THIS INVOICE</b>						<b>1,584.85</b>		

**BILLING COMMENTS:**

Please make check payable to Aggleton & Associates, Inc.

Review of As-built Submittals  
Site Visit for System Acceptance

INVOICE STATUS at 05/03/12

Invoice #	Invoice Date	Age	Invoice Amount (\$)			Receipts		Balance Due	Status
			Project Fee	Expenses	Total	Amount	Date		
<b>SUMMARY TO-DATE</b>			<b>38,400.00</b>	<b>1,436.87</b>	<b>39,836.87</b>	<b>36,467.17</b>	----	<b>3,369.70</b>	----
13092	05/31/11	29	3,200.00		3,200.00	3,200.00	06/29/11	0.00	Paid, Thank You
13105	06/30/11	14	16,800.00	367.20	17,167.20	17,167.20	07/14/11	0.00	Paid, Thank You
13116	07/31/11	24	4,000.00	183.60	4,183.60	4,183.60	08/24/11	0.00	Paid, Thank You
13129	08/31/11	26	1,200.00		1,200.00	1,200.00	09/26/11	0.00	Paid, Thank You
13142	09/30/11	20	3,600.00	183.60	3,783.60	3,783.60	10/20/11	0.00	Paid, Thank You
13149	10/31/11	10	1,800.00		1,800.00	1,800.00	11/10/11	0.00	Paid, Thank You
13164	11/30/11	12	3,200.00	332.77	3,532.77	3,532.77	12/12/11	0.00	Paid, Thank You
13178	12/31/11	20	1,600.00		1,600.00	1,600.00	01/20/12	0.00	Paid, Thank You
13201	02/29/12	63	1,600.00	184.85	1,784.85			1,784.85	PAST DUE
13226	05/03/12	0	1,400.00	184.85	1,584.85			1,584.85	Current



A close-up photograph of a person's hand holding a pen, writing in an open notebook. The desk is cluttered with various office supplies, including several black paper clips, colorful sticky notes (yellow, pink, blue, green), and a stack of papers. The background is slightly blurred, focusing attention on the writing process.

# Collections: Getting Payment on Time

- Negotiate terms of payment in contract
- Do not start work without contract
- If you are a sub-consultant, you get paid when prime gets paid!
- Give no excuses for late payment:
  - **Timely/Professional Deliverables**
  - **Responsive to Client Needs & Changes**
  - **Timely, Accurate & Correctly Formatted Invoices**

# Collections: When Payment is Late

- Elicit Reason for Delay – Correct if it is due to you
- Be a Squeaky Wheel! – Persistence Works
- Threaten to Withhold Services
- Withhold Services
- Lawyer's Letter – Small Claims Court
- Chalk it up to Experience – Learn from it!



The background of the slide features several overlapping, slightly crumpled pieces of light-colored paper. Each piece of paper has a large, bold, black question mark printed on it. The papers are arranged in a way that creates a sense of depth and layering, with some question marks partially obscured by others. A solid purple horizontal band runs across the middle of the image, serving as a backdrop for the title text.

# QUESTIONS & DISCUSSION



Tuesday, March 28, 2023

Timeframe	Session	Subject
8:30 AM	<b>Intro</b>	<b>Welcome &amp; Introductions</b>
8:45 AM	<b>Session 1</b>	<b>The Business of Security Consulting</b>
9:15 AM	<b>Session 2</b>	<b>Establishing and Operating a Consulting Practice</b>
10:30 AM		<b>BREAK</b>
10:45 AM	<b>Session 3</b>	<b>Security Consulting Practice Areas</b>
12:00 PM		<b>LUNCH</b>
1:00 PM	<b>Session 4</b>	<b>Getting Business &amp; Attracting Clients</b>
2:00 PM	<b>Session 5</b>	<b>Executing a Consulting Assignment</b>
3:00 PM		<b>BREAK</b>
3:15 PM	<b>Session 6</b>	<b>Avoiding Common Mistakes &amp; Pitfalls</b>
4:00 PM	<b>Session 7</b>	<b>Summary &amp; Wrap-Up</b>

A photograph of a break table set up for a gathering. The table is covered with a white cloth and features a variety of items. In the foreground, there are two large silver thermal carafes with black lids, both labeled "Accurate (416) 266-2791". To the left of the carafes, several glass jars with silver lids are filled with different types of cookies. Each jar has a small white card with a black border and text identifying the cookie type: "TRIPLE CHOCOLAT ESPRESSO", "CHOCOLATE CHIP", and "PEANUT BUTTER CHOCOLATE CHIP". Behind the jars, a stack of white ceramic coffee cups is visible. To the right of the carafes, there is a small white bowl containing a spoon, a basket filled with yellow packets of sweetener, and a metal mesh basket containing several small white containers of cream cheese. A large bundle of wooden sticks is also visible on the right side of the table. In the background, two wooden chairs with patterned seats are partially visible. The word "BREAK" is superimposed in large, white, bold, sans-serif capital letters across the center of the image.

# BREAK





# Session 3: Security Consulting Practice Areas





# Security Consulting Practice Areas

**Four primary practice areas for security consultants:**

- ✓ **Security Management Consultants**
- ✓ **Technical Security Consultants**
- ✓ **Forensic Security Consultants**
- ✓ **Cybersecurity Consultants**

**Some consultants may offer services that overlap more than one practice area**



# Security Consulting Practice Areas: Security Management Consulting

# Security Management Consulting

- **Typical Consulting Services**
  - **Threat Assessment & Crime Analysis**
  - **Vulnerability: Security Surveys, Security Reviews, and Risk Assessments**
  - **Security Countermeasures:**
    - **Physical Security Elements & Systems**
    - **Personnel – Awareness & Security Staffing**
    - **Policies, Procedures, Post Orders, Training, & Handbooks**



# Security Management Consulting

- **Typical Consulting Services**
  - **Liability Prevention**
  - **Crime Prevention / Reduction**
  - **Emergency Planning & Business Continuity**
  - **Workplace Violence & Active Shooter Prevention & Response**
  - **Compliance Reviews (Regulations, Standards, Policy/Procedures, & Best Practices)**
  - **Conceptual Design of Security Systems**

# Security Management Consulting

## Market Segments

- Retail
- Financial
- Warehousing
- Insurance
- Cultural
- Museums
- Healthcare
- Education
- Utilities
- Hotels and Resorts

## Market Segments

- Gambling
- Entertainment
- Conventions
- Residential
- Commercial
- Communications
- Parking
- Computer/Data
- Transportation
- Pharmaceutical

## Market Segments

- Criminal Justice
- Manufacturing
- Aerospace
- Government
- Foreign Embassy
- Petroleum
- Marijuana
- Critical Infrastructure

# Security Management Consulting Specialties by Service

- ✓ Site Survey
- ✓ Threat/Risk/Vulnerability Analyses
- ✓ Systems Design
- ✓ Program Design
- ✓ Project Management
- ✓ Personnel Management
- ✓ Manpower Resource Allocation and Distribution
- ✓ Training
- ✓ Classified Programs
- ✓ Executive Protection
- ✓ Policies and Procedures
- ✓ Forensic Science
- ✓ Expert Witness Testimony
- ✓ Loss Prevention
- ✓ Crisis Management
- ✓ Disaster Planning and Recovery
- ✓ Crime and Risk Statistics
- ✓ Counterespionage
- ✓ Counter-terrorism
- ✓ Anti-terrorism
- ✓ Investigation
- ✓ Hostage Negotiations



# Security Management Consulting Specialties by Asset Type

- ✓ Executives/VIP's/Families
- ✓ Intellectual Property
- ✓ Trade Secrets
- ✓ Data
- ✓ Negotiables
- ✓ Construction Site
- ✓ Major Events
- ✓ Artifacts
- ✓ Priceless Objects
- ✓ Power and Communication Grids
- ✓ Nuclear Materials
- ✓ Pipelines

A man in a dark t-shirt and jeans stands on the left, pointing at a large digital display. The display shows a 'Process Maturity Measurement' dashboard with several circular gauges and charts. In the background, a control room with multiple computer monitors and people working is visible. The text 'Security Consulting Practice Areas: Forensic Security Consulting' is overlaid in the center.

# Security Consulting Practice Areas: Forensic Security Consulting

# Forensic Security Consultant

## What is their Role?

Serve	Provide	Accomplish
Serve as security expert witness	Provide the trier of fact information or perspectives beyond their common knowledge	Accomplish that by evaluating evidence provided through legal discovery



# Forensic Security Consultant



**Can serve as Testifying or Consulting Expert**

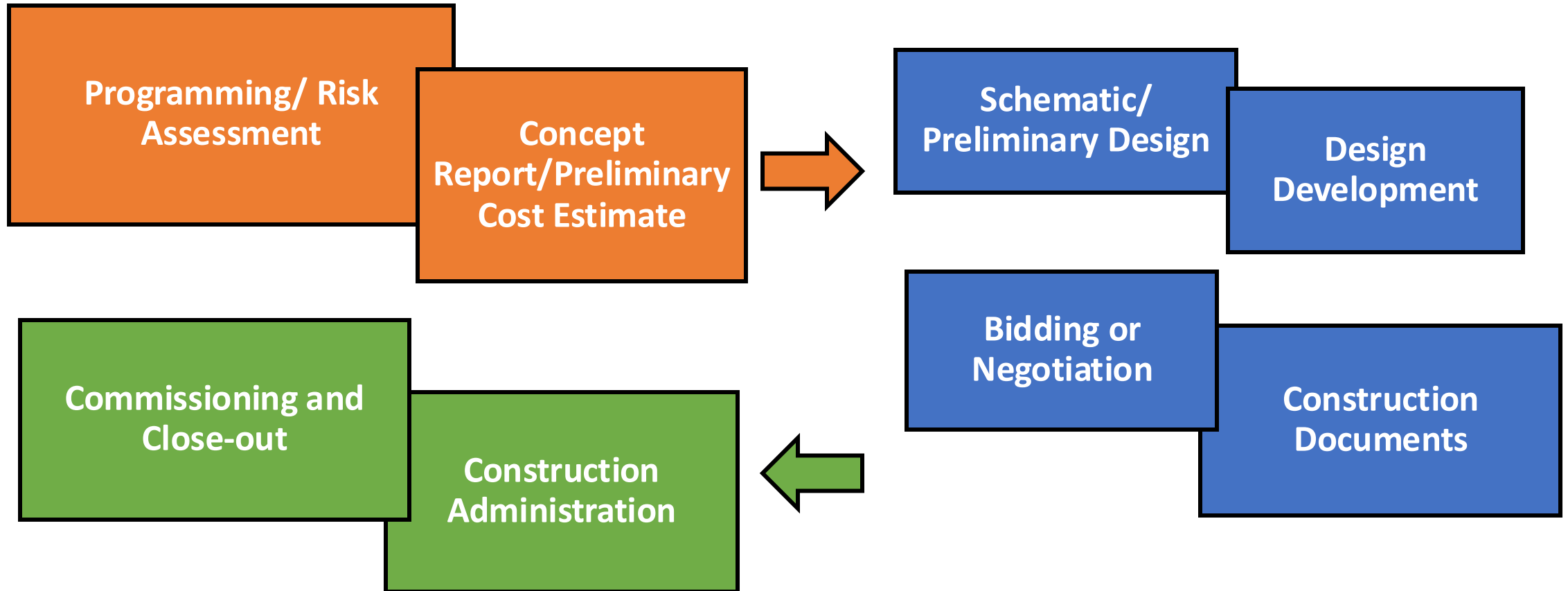


**Testifying Experts provide testimony in a deposition and/or at trial in a litigation on behalf of a plaintiff or defendant**



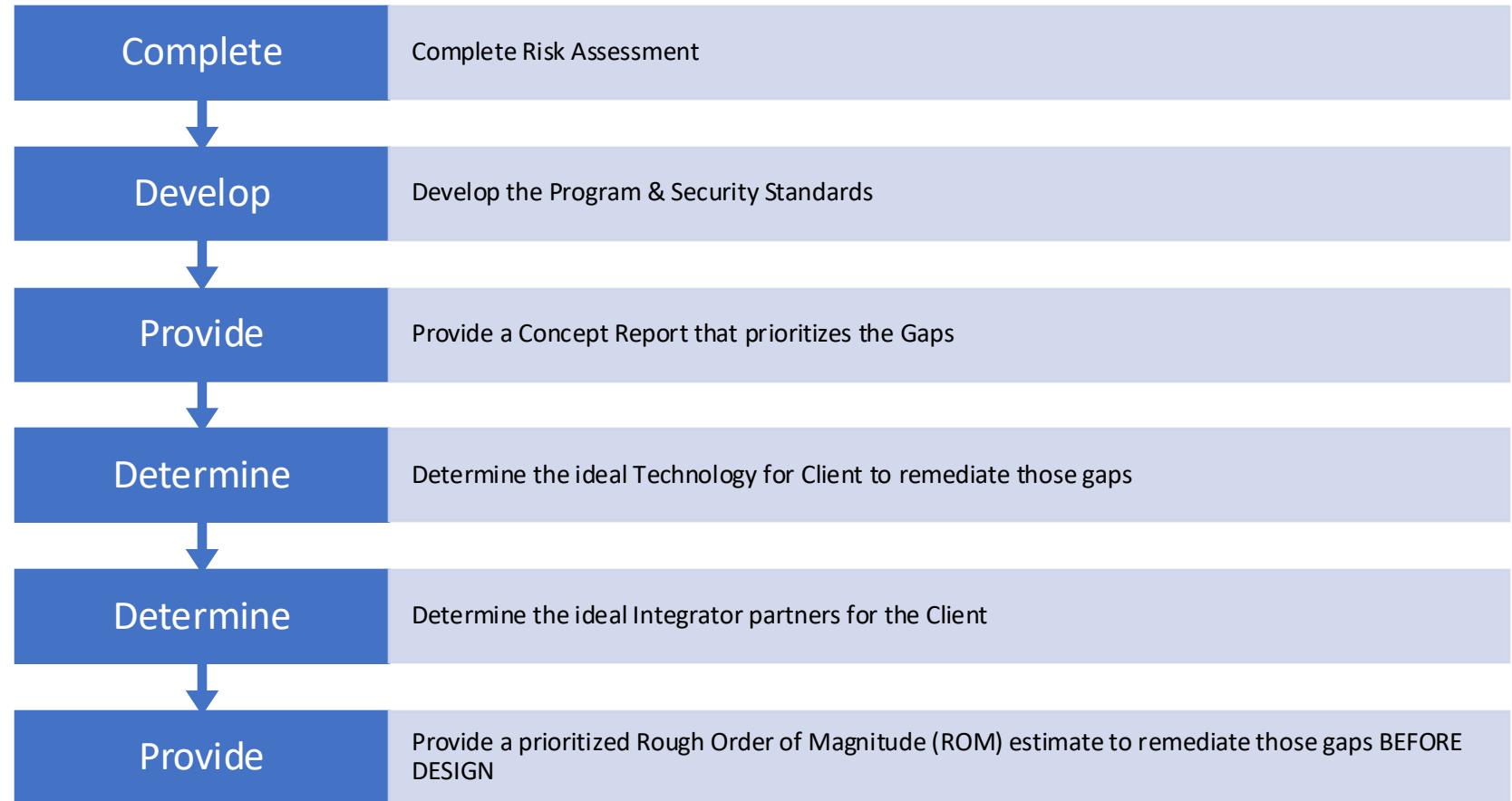
**Consulting Experts provide expert security advice to attorneys but do not testify**

# Technical Security Project Stages



# The Technical Security Consultant

## PLAN & ASSESS





# The Technical Security Consultant

## PLAN & ASSESS

- Complete Risk Assessment
- Develop the Program & Security Standards
- Provide a Concept Report that prioritizes the Gaps
- Determine the ideal Technology for Client to remediate those gaps
- Determine the ideal Integrator partners for the Client
- Provide a prioritized Rough Order of Magnitude (ROM) estimate to remediate those gaps BEFORE DESIGN

# The Technical Security Consultant

DESIGN & ENGINEER

- Schematic Design (SD)
- Preliminary Design
- Design Development (DD)
- Construction Documents (CD)
- Project Specifications
- Bidding and/or Negotiation

# The Technical Security Consultant

## CONSTRUCTION ADMINISTRATION

- Provide Bid or Negotiation Services
- Answer RFIs & Submittals
- Verify System Installation
- Confirm Specifications Met
- Test ESS Systems
- Commission
- Accept & Close-Out
- Provide Training & ConOps





# Security Consulting Practice Areas: Technical Security Consulting

# The Technical Security Consultant



**Expert in security technology and application of physical and electronic security systems**



**May work for the architect, the engineer or the owner**

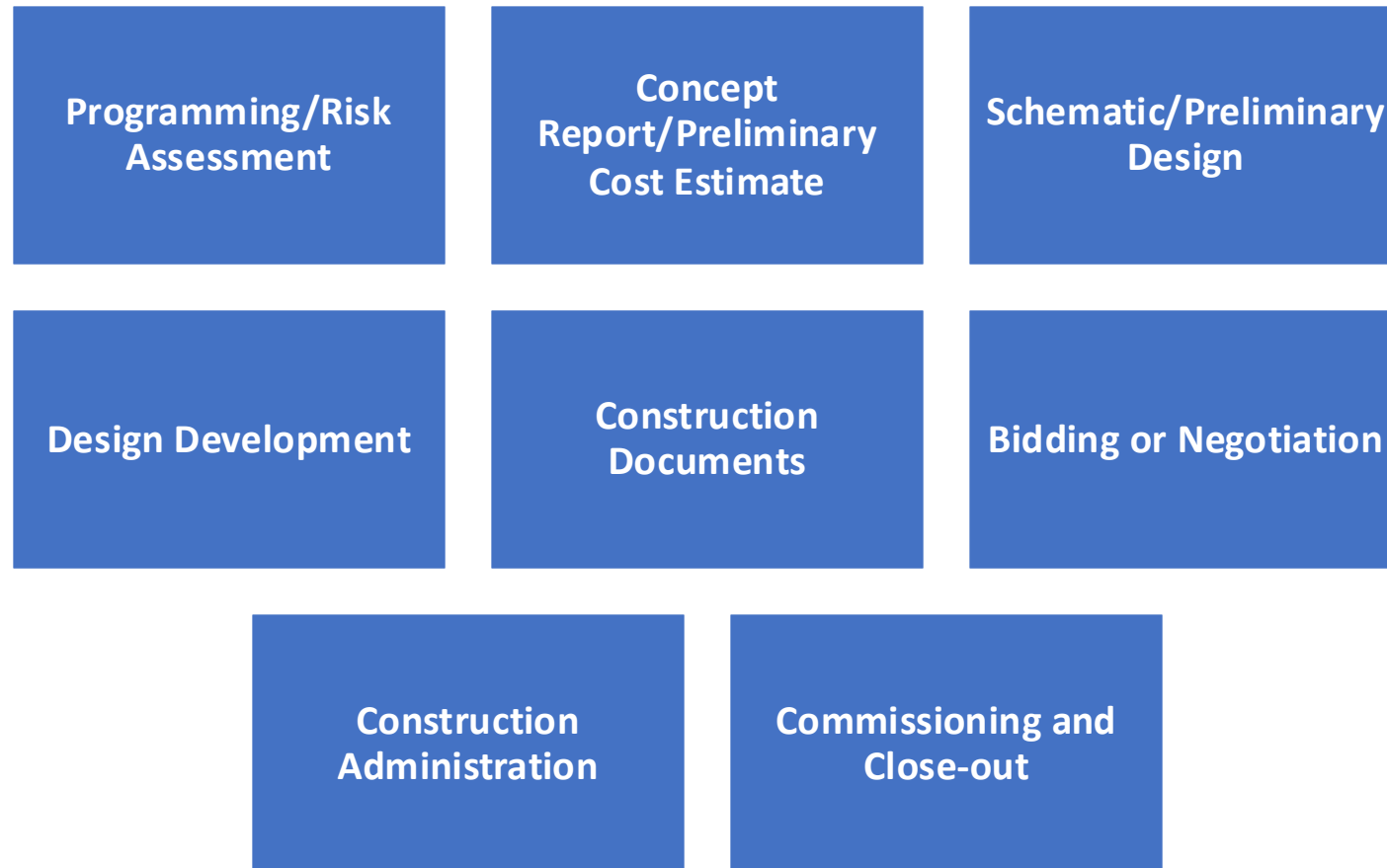


**Develops, identifies and interprets security requirements, constraints, and culture into complete system**



**Integrates people, technology, and procedures while meeting applicable building codes**

# Technical Security Project Stages





A man with a beard, wearing a white shirt and a dark tie, is seated at a desk in a server room. He is looking directly at the camera. The desk is cluttered with several computer monitors. The background is filled with rows of server racks and more monitors displaying various data visualizations, including world maps and network diagrams. The overall lighting is dim, with a blue tint, suggesting a high-tech, secure environment.

# Security Consulting Practice Areas: Cybersecurity Consulting



# The Cybersecurity Consultant

Expert in Information Technology (IT) and network security

Conduct security assessments to assess existing IT security controls against regulatory requirements and industry standards

Conduct penetration tests to identify vulnerabilities and gaps in existing controls

Develop procedures and systems to assure improve client's overall cybersecurity program

Develop user training programs to educate client personnel on best practices as they relate to cybersecurity

# QUESTIONS & DISCUSSION






LUNCH

Tuesday, March 28, 2023

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The background image shows a group of business professionals in a modern office setting. They are silhouetted against large windows that look out onto a bright, hazy sky, suggesting a sunrise or sunset. The people are standing and appear to be in a collaborative meeting, with some holding papers or documents. The overall mood is professional and focused.

# Session 4: Getting Business and Attracting Clients



# Rules of Marketing

- **Rule #1:** You must have a proactive marketing plan in place
- **Rule #2:** You must take daily action to execute your marketing plan
- **Rule #3:** You must keep executing your plan throughout the life of your practice even when you are busy

# Challenges in Selling Security Consulting

- The concept of using an **“Independent Security Consultant”** often must be sold before you can sell yourself
- Most security consulting projects are **“event driven”** – client must have an immediate need to hire you (pain/gain/problem-solving)
- The key is to get them to remember you when they do have a need





# Scaling Your Security Consulting Practice: Client Acquisition Strategies

- ✓ In today's increasingly risk-aware business environment, security consulting is in high demand — but competition is fierce.
- ✓ Outline proven strategies to differentiate your security consulting practice
- ✓ Attract high-value clients,
- ✓ Build a sustainable business model that generates consistent revenue.

We'll explore ten actionable approaches that:

- ✓ Leverage your expertise,
- ✓ Amplify your market presence, and
- ✓ Position your firm as the go-to resource for organizations facing complex security challenges.

Each strategy includes practical implementation steps and a balanced analysis of benefits and benefits and limitations.





# Defining Your Value Proposition

Your value proposition is the foundation of your practice's identity and messaging. It must clearly articulate what specific expertise or approach expertise or approach sets you apart from competitors in the security space.

Focus on specialized offerings that address specific client pain points—whether that's comprehensive risk assessments, insider threat programs, ISO compliance frameworks, or crisis management protocols. This targeted approach positions your firm as a subject matter expert rather than a generalist.

## Benefits

- Attracts clients with specific security challenges
- Clarifies brand identity for
- Commands premium pricing for specialized expertise

## Considerations

- May limit appeal to broader
- Requires deep expertise in chosen niche
- Needs periodic refinement as market evolves

## Implementation

- Conduct competitor analysis to identify gaps
- Survey existing clients about your differentiators
- Test messaging with focus before rollout

# Targeted Market Research & Client Profiling

Strategic market research helps identify industries and regions with elevated security needs or regulatory pressure. By pinpointing verticals like healthcare, education, or manufacturing that face specific security challenges, you can tailor your outreach and solutions accordingly.

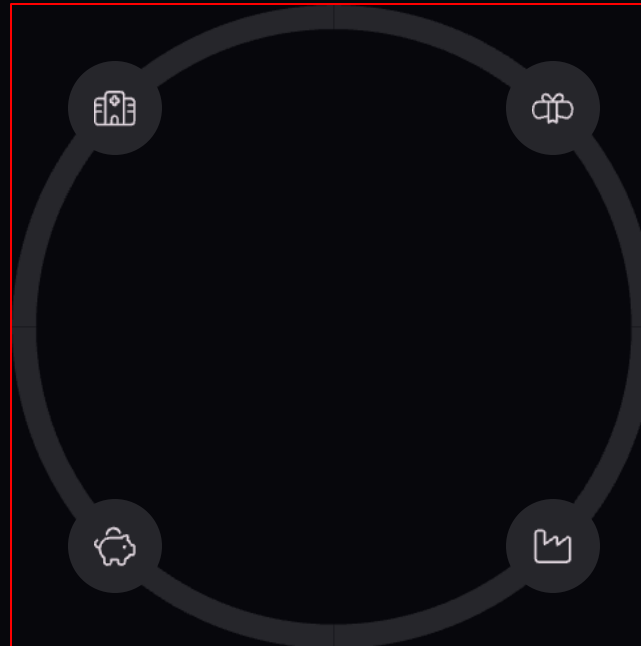
Client profiling goes beyond basic demographics to understand decision-making structures, budget cycles, and specific risk factors relevant to each prospect. This intelligence allows for hyper-relevant positioning that resonates with potential clients' actual pain points.

## Healthcare

HIPAA compliance, patient data protection, physical security challenges, IoT device vulnerabilities

## Financial

Regulatory compliance, fraud prevention, protection, cyber-physical security



## Education

Campus safety, active shooter preparation, data security, international risk

## Manufacturing

Supply chain security, intellectual property protection, OT/IT convergence challenges

# Leveraging Referrals & Relationship Marketing

Relationship marketing remains one of the most powerful client acquisition channels for security consulting. Your existing clients, industry partners, and personal networks can significantly accelerate growth through trusted referrals that bypass typical sales resistance.

Architects, insurance providers, technology vendors, and legal firms frequently interface with clients during security-sensitive periods—making them excellent referral partners. The key is creating a structured referral program that incentivizes and acknowledges these valuable connections.





# Building Strategic Alliances

Strategic alliances with complementary service providers can dramatically expand your capabilities, market reach, and credibility. By forming cybersecurity companies, or architecture and engineering teams, you can offer comprehensive solutions that address multiple client needs

These alliances enable you to bid on larger projects, share marketing costs, and leverage each partner's reputation and client base. The key is finding partners whose partners whose services complement rather than compete with yours, and who maintain similar quality standards and business ethics.

## Legal Firms

Partner with law firms specializing in compliance, liability, or privacy law. They can clients needing security assessments to strategies, while you can refer clients guidance on security findings.

- Joint offerings: Security-legal risk assessments
- Shared expertise: Legal implications of security security findings

## Cybersecurity Firms

Form alliances with companies focusing on security to create comprehensive physical-protection programs. This creates a "one-for clients concerned about converged

- Joint offerings: Cyber-physical security assessments
- Shared expertise: IoT and smart building vulnerabilities

## Architecture & Engineering Teams

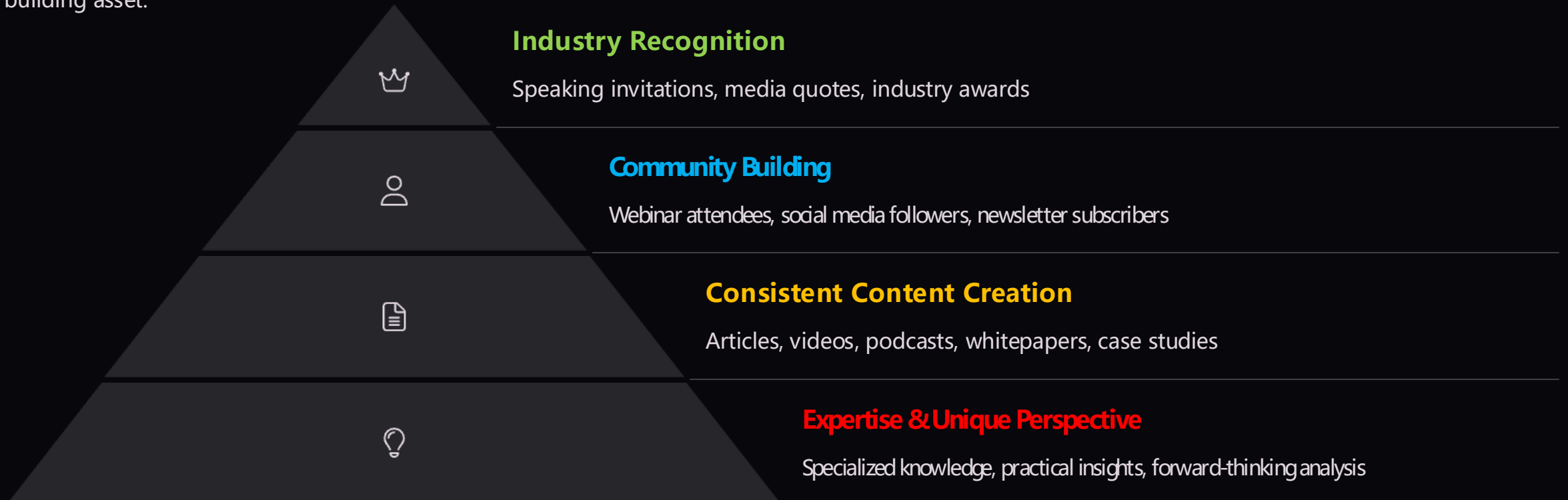
Collaborate with A&E firms to integrate considerations directly into building plans renovations, increasing efficiency and of security measures.

- Joint offerings: Security-by-design consulting
- Shared expertise: CPTED and structural security

# Developing Thought Leadership

Establishing yourself as a thought leader in security consulting doesn't just build brand recognition—it fundamentally changes how prospects perceive your insights through whitepapers, case studies, videos, and webinars, you position yourself as a trusted advisor rather than a vendor.

Content marketing works particularly well in security consulting because the field is complex and evolving. Organizations seek guidance from experts who can translate emerging threats into practical business implications. Your thought leadership content serves as both a lead generation tool and a trust-building asset.



# Maximizing Industry Events

Industry events like ISC West, ASIS, and GSX offer unparalleled opportunities to connect with decision-makers and showcase your interactions at these events can accelerate relationship-building in ways digital marketing cannot match, particularly in the trust-based

Speaking engagements at these events elevate your visibility and credibility, while strategic sponsorships can increase brand events with clear objectives beyond just attendance — whether that's generating leads, building partnerships, or researching competitor

## Pre-Event Strategy

- Set clear, measurable goals for the event
- Schedule meetings with key prospects in advance
- Develop compelling materials and talking points

## On-Site Execution

- Deliver valuable presentations or participate in panels
- Collect qualified leads with specific follow-up follow-up notes
- Network strategically rather than

## Post-Event Follow-Up

- Contact leads within 48 hours with personalized outreach
- Share relevant resources based on conversations
- Track conversion rates to measure ROI



# Leveraging Client Success Stories

Well-documented client success stories serve as powerful proof points that validate your consulting approach and demonstrate concrete results. These testimonials and case studies transform case studies transform abstract promises into tangible evidence that your security solutions deliver measurable outcomes.

The most effective case studies highlight specific, quantifiable improvements—whether that's risk reduction percentages, compliance achievement, incident frequency maintaining client confidentiality, these narratives illustrate your problem-solving capabilities and implementation success.



## Healthcare Security Transformation

Reduced security incidents by 47% through comprehensive comprehensive security program redesign for regional hospital hospital system. Implemented integrated access control, control, modernized command center operations, and enhanced staff training protocols.



## Corporate HQ Protection

Designed and implemented executive protection Fortune 500 company, resulting in zero security 92% employee satisfaction with new measures. security with corporate culture requirements.



## Manufacturing Security Overhaul

Comprehensive security assessment identified \$3.2M in annual annual losses from theft and inefficient processes. Implementation of recommendations reduced losses by 82% in by 82% in first year with 290% ROI on security investment. investment.

# Optimizing Digital Marketing & SEO

A robust digital presence is essential for security consulting firms targeting modern businesses. Strategic SEO optimization around key industry protection services" or "security risk assessment" ensures visibility when decision-makers search for solutions to security challenges.

While traditional security consulting often relied primarily on relationships, today's clients frequently begin their vendor research online. Targeted LinkedIn advertising, content marketing, and strategic keyword optimization create multiple digital touchpoints that build familiarity before direct contact even occurs.



## SEO Keyword Strategy

Target industry-specific long-tail keywords with high intent and competition. Focus on terms that indicate active security behavior rather than general information.



## LinkedIn Advertising

Develop highly targeted campaigns focusing on decision-makers by industry, company size, and job function. Use direct response offers like security assessment checklists to generate qualified leads.



## Gated Content Assets

Create high-value downloadable resources (threat analysis compliance guides) that require contact information, building database while demonstrating expertise.



## Analytics & Optimization

Implement comprehensive tracking to measure engagement, lead quality, lead quality, and conversion paths. Continuously refine digital strategies based on performance metrics and ROI analysis.

# Direct Outreach Strategies

While inbound marketing attracts prospects already seeking security services, proactive outreach remains essential for accelerating growth and targeting organizations. A strategic direct outreach program puts your firm on the radar of prospects who may need your services but haven't actively searched for

The key to effective direct outreach is personalization and relevance. Generic cold emails typically generate minimal response, while tailored messages challenges facing the prospect's industry or organization can achieve significantly higher engagement rates.



## Research & Targeting

Identify companies with specific security risk indicators (recent incidents, regulatory changes, expansion plans) through news monitoring and industry intelligence.



## Personalized Outreach

Craft individualized messages referencing specific company challenges and offering relevant insights rather than generic service descriptions.



## Multi-Channel Follow-Up

Implement a structured sequence of touchpoints across email, LinkedIn, phone, and even direct mail to maximize response opportunity.



## Value-First Engagement

Focus initial conversations on providing immediately useful insights rather than pushing for a sale, establishing trusted advisor positioning.

# Creating Recurring Revenue Models

Transitioning from project-based work to retainer and subscription-based models creates predictable cash flow while building deeper client relationships. Services like fractional CSO  
Services like fractional CSO arrangements, monthly compliance audits, or ongoing threat intelligence briefings provide continuous value while stabilizing your firm's revenue.  
your firm's revenue.

These recurring models also enable more efficient resource allocation and team utilization. Rather than constantly pursuing new projects, your team can  
of client environments and provide increasingly valuable strategic guidance as the relationship matures.



## Monthly Compliance Reviews

Regular audits ensuring continued adherence to security standards



## Fractional CSO Services

Part-time executive security leadership for organizations without full-time need



## Threat Intelligence Subscriptions

Recurring industry-specific threat analysis and briefings



## Quarterly Security Program Maintenance

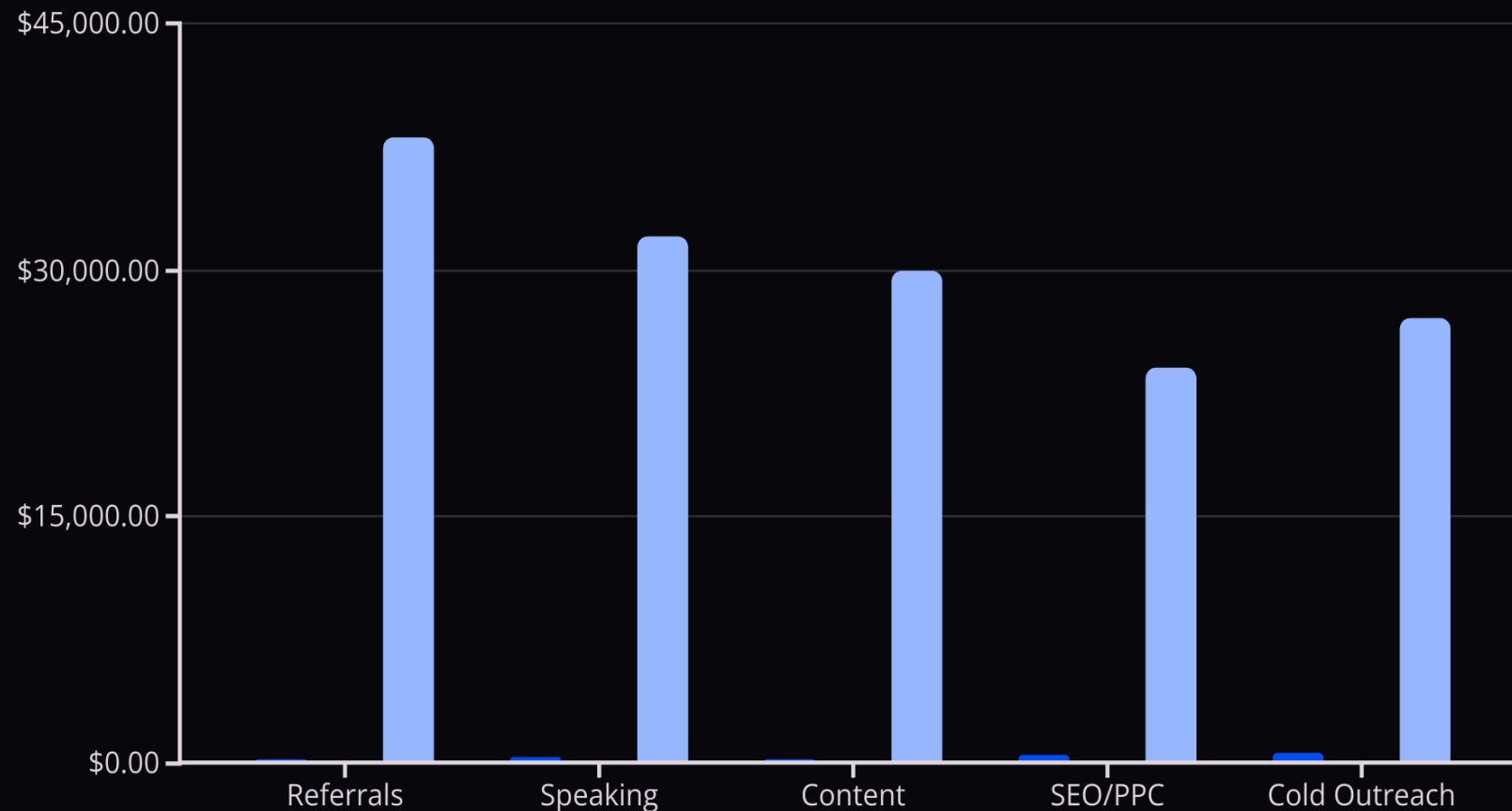
Regular updates to policies, procedures, and training materials



# Client Acquisition Metrics

Implementing a data-driven approach to client acquisition allows you to optimize marketing spend and focus on highest-performing channels. By tracking key metrics throughout the sales cycle, you can identify bottlenecks, refine messaging, and make evidence-based decisions about where to invest resources.

The most successful security consulting firms establish clear KPIs for each acquisition channel and regularly review performance data to guide strategy. This analytical approach ensures marketing budgets are allocated efficiently and prevents over-investment in underperforming tactics.



# Success Factors & Time Expectations

Client acquisition strategies vary significantly in implementation difficulty, time-to-results, and resource requirements. Understanding these variables helps set realistic expectations and create a balanced acquisition portfolio that includes both quick wins and long-term investments.

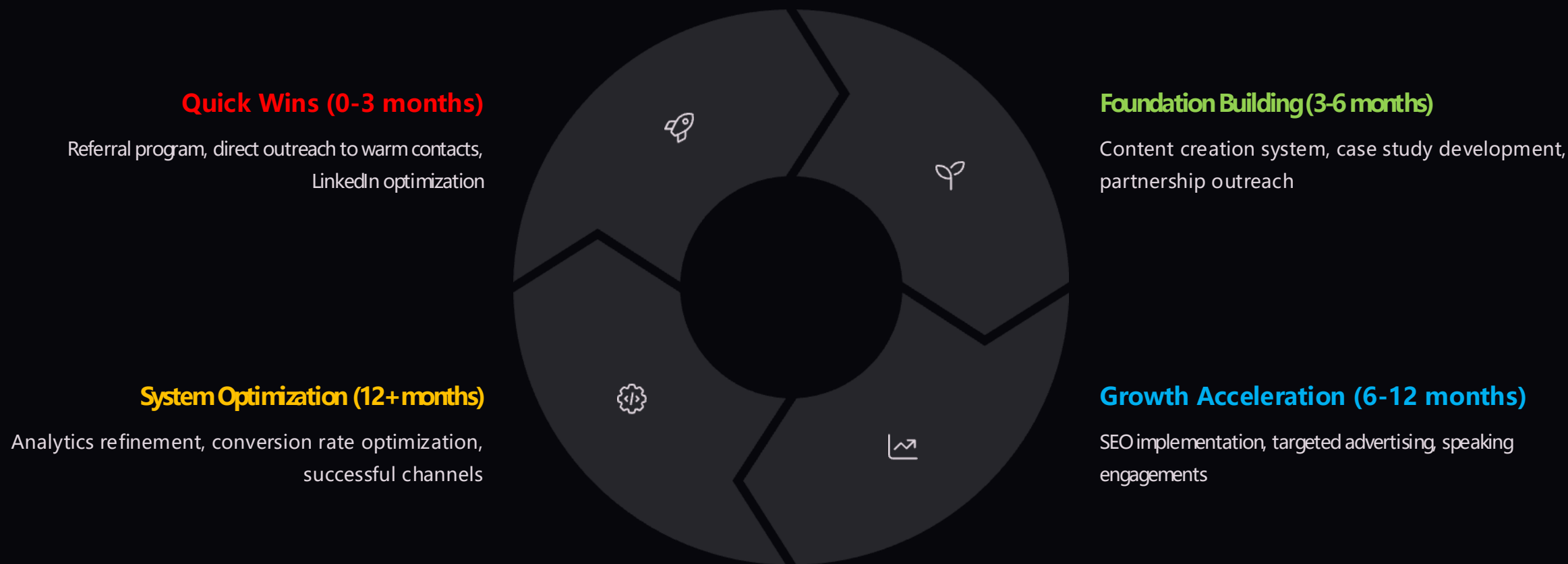
The most successful security consulting practices implement a staged approach — beginning with immediate results while simultaneously building foundations for more sustainable, scalable mature over time.

Strategy	Time to First Results	Implementation Difficulty	Resource Intensity
Referral Marketing	1-3 months	Low	Low
Direct Outreach	1-2 months	Medium	High
Strategic Alliances	3-6 months	Medium	Medium
Content Marketing	6-12 months	Medium	High
SEO Optimization	6-12 months	High	Medium
Industry Events	3-6 months	Low	High
Thought Leadership	12-18 months	High	Medium

# Implementation Roadmap

Successful implementation requires a phased approach that balances immediate revenue generation with building sustainable acquisition systems. This roadmap prioritizes strategies based on your current stage of business development and resource availability.

Remember that consistent execution is more important than perfect strategy. Begin with the approaches that best match your and gradually expand your acquisition toolkit as resources permit.



The path to consistent client acquisition combines strategic planning with disciplined execution. By implementing these proven approaches and continuously measuring results, your security consulting practice can establish a sustainable competitive advantage and predictable and predictable growth trajectory.



# Teaming



# What is “Teaming”

- “Teaming” is the forming of a business relationship between two or more consultants for the purposes of soliciting and performing consulting projects
- Teaming can be done on a one-time basis to pursue a specific project, or can be an ongoing relationship that lasts for years

# Reasons to Consider Teaming

- **Individual consultant lacks expertise to perform work in one or more areas where the client is requesting services**
  - Security management consultant teams with technical security consultant to perform assessment of access control system technology
  - Technical security consultant teams with cybersecurity consultant to design network for security systems

# Reasons to Consider Teaming

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- **Individual consultant lacks staffing to complete project within requested time frame**
  - Security assessments for 40 sites must be completed within 30 days. It would be impossible for a sole-practitioner consultant to meet this schedule, so s/he teams with several other security management consultants to assist with this engagement

# Reasons to Consider Teaming



- **Project is spread across large geographical area**
- Client wants assessments conducted at distribution centers located in fifty states. A Florida based consultant does not feel that he can cost effectively provide services beyond the east coast, so teams with other consultants located in different parts of the country.



# Reasons to Consider Teaming

- **Project requires specialized certifications or licensure**
  - Client RFP states that at least one consultant on team have a CISSP certification. The security management consultant pursuing the project does not have this credential, so they team with a cybersecurity consultant who does.

# Reasons to Consider Teaming

- **There would be a marketing advantage by including certain members on the team**
  - A technical security consultant teams with the client's favorite electrical engineering firm to pursue a security systems design project
  - A security management consultant pursuing an assessment project for a hospital project teams with a highly-respected former security director that recently retired from a well-known hospital

# Suggestions for Teaming

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- Know Who You are Teaming With
- Have a Written Agreement That Defines the Teaming Arrangement
- Provide a Single Point of Contact for the Client
- Provide Consistency in Work Product Delivered to the Client
- Agree to How any Follow-Up Work will be Divided Up



The background of the slide features several overlapping, slightly crumpled pieces of light-colored paper. Each piece of paper has a large, bold, black question mark printed on it. The papers are arranged in a way that creates a sense of depth and layering. A solid purple horizontal band is superimposed over the center of the image, serving as a backdrop for the title text.

# QUESTIONS & DISCUSSION



Tuesday, March 28, 2023

Timeframe	Session	Subject
8:30 AM	<b>Intro</b>	<b>Welcome &amp; Introductions</b>
8:45 AM	<b>Session 1</b>	<b>The Business of Security Consulting</b>
9:15 AM	<b>Session 2</b>	<b>Establishing and Operating a Consulting Practice</b>
10:30 AM		<b>BREAK</b>
10:45 AM	<b>Session 3</b>	<b>Security Consulting Practice Areas</b>
12:00 PM		<b>LUNCH</b>
1:00 PM	<b>Session 4</b>	<b>Getting Business &amp; Attracting Clients</b>
2:00 PM	<b>Session 5</b>	<b>Executing a Consulting Assignment</b>
3:00 PM		<b>BREAK</b>
3:15 PM	<b>Session 6</b>	<b>Avoiding Common Mistakes &amp; Pitfalls</b>
4:00 PM	<b>Session 7</b>	<b>Summary &amp; Wrap-Up</b>

A professional setting with a man standing behind a glass conference table. He is wearing a light blue dress shirt and a blue patterned tie. He is smiling and looking towards the camera. Two women are seated at the table behind him. The woman on the left is partially visible, and the woman on the right is looking towards the camera. The table is set with glasses of water and white coffee cups. The background is a bright, modern office space with large windows.

# Session 5: Executing a Consulting Assignment

**SUPPORT**

**EXPERT**

**CONSULTING**

**Security  
Management  
Consulting:  
Conducting an  
Assessment**

**SUCCESS**

**SERVICE**

**KNOWLEDGE**

# Planning Your Approach

## What Are The Goals and Deliverables?

- **Type of Assessment**
- **What it includes**
- **What it excludes**
- **Timeline**
- **Deliverables**

## Pre-Trip Planning

- **Logistics and Planning**
- **Data collection**

## Execution

- **Opening**
- **Field work and analysis**
- **Closing**

## Reporting

- **Report preparation**
- **Presentation to client**



A top-down view of various travel and fieldwork items. In the upper left, a pair of black-rimmed glasses rests on a green topographic map. Below the glasses is a silver compass with a black face and a red needle. To the right of the compass is a black camera lens with yellow markings. Below the lens is a silver digital watch with a black strap. In the bottom left, a brown leather wallet with a black 'X' logo is visible, along with a black smartphone. A US dollar bill is partially visible under the watch. The background is a green topographic map with brown contour lines and blue lines representing water bodies.

# Pre-Trip Work

- **Data to gather data in advance of site work:**
  - **Policies & Procedures**
    - Security related (but may be in HR)
    - Post Orders
  - **Prior surveys & reports**
  - **Crime statistics**
  - **Site incident records & reports**
  - **Security training curricula**
  - **Organization Chart**
  - **Facility Plans**
    - Site & floor plans
    - System as-builts/record drawings





# Pre-Trip Work

---

- **Logistics and Planning**
  - Study documents provided
    - Policies and procedures
    - Incident reports
    - Site and floor plan drawings
  - Conduct “virtual” tour of site
  - Schedule meetings
    - Kick-off meeting
    - Interviews with stakeholders
    - Interviews with local law enforcement
    - Closing meeting



# Pre-Trip Work

- **Prepare for Interviews**
  - **Select Interview Candidates**
    - Coordinate with client representative
    - High as possible within organization but know operations
    - Use org chart to verify coverage
    - Include front-line staff including receptionists and security officers
  - **Develop & Issue Questionnaire**
    - Prepares interviewee in advance
    - Tailor questions for person being interviewed
    - Don't rely on it being read before the interview





# Pre-Trip Work

## ➤ Survey Tools:

- ✓ Checklists and interview outlines
- ✓ Site plans and floor plans
- ✓ Notepads and pens
- ✓ Tape measures
- ✓ Clipboard
- ✓ Digital camera
- ✓ Video recorder
- ✓ Tape recorder
- ✓ Light meter



# Pre-Trip Work

- **Dress for conditions:**
  - **May need different clothing for interviews and site survey work**
  - **Consider the weather**
  - **Determine any requirements for safety equipment**
  - **Wear comfortable shoes!**



# On-Site Activities

- **Kick-Off Meeting**
  - Scope of assessment
  - How the assessment will be conducted
  - Schedule and timeline
  - Confirmation of client's goals and objectives
  - Confirmation of desired report format and deliverables
  - Additional information needed to complete assessment



# On-Site Activities

- **Interviews**
  - Interviews should be one-on-one interviews or in small groups
  - Avoid situations where interviewee cannot be candid
  - Keep questions as open-ended as possible
  - Identify each person's greatest concerns
  - Solicit ideas for security improvements





# On-Site Activities

- Interviews

- Try to Read the Corporate Culture
  - ✓ Which solutions will work and which will not?
  - ✓ Run some solution ideas up the flagpole
  - ✓ Who are the decision makers?
- Identify any other Security Constraints
  - ✓ Operations that must not be impeded
  - ✓ Organization's projected image
  - ✓ Budgetary issues



# On-Site Activities

- **Site Perimeter Survey**
- **Fencing and gates**
- **Parking lots**
- **Access to shipping/receiving docks**
- **Utilities and critical infrastructure**
- **Adjacent properties and activities**
- **Lighting (nighttime)**





# On-Site Activities

- **Building Perimeter Survey**
  - Doors and lock hardware
  - Windows
  - Louvers and grates
  - Overhead doors
  - Roof access





# On-Site Activities

- **Building Interior Survey**
  - Areas with high-value assets
  - Areas with confidential information
  - Areas with critical infrastructure
  - Lobbies
  - Executive offices
  - MDF/IDF and Server Rooms





# On-Site Activities

## ➤ Security Systems Condition Survey

### ✓ Access Control

- Installation
- Administration, Monitoring, Functionality
- Badging, Visitor Management

### ✓ Alarm Monitoring

- Alarm volume data (is there a problem)
- On & Off Site

### ✓ Video

- Monitoring, Management, Playback
- Function and recording duration
- Image quality
- Completeness of coverage

### ✓ System Maintenance and Software Support

A photograph of two construction workers in silhouette standing on a platform, looking out over a construction site at sunset. The sun is low on the horizon, creating a bright orange glow. Scaffolding and structural elements of a building under construction are visible in the background.

# On-Site Activities

- **Site Observation**
  - Site entrances
  - Lobby activities
  - Employee entrances
  - Security posts
  - Loading docks
- *Observe activity both during day and at night if possible*



# Analyzing Data

- ✓ Catalog high impact issues along the way for closing meeting
- ✓ Considering probability, consequences and level of preparedness, add the scores and rank – what are the highest risks
- ✓ What are the preparedness gaps which contribute to the highest risks

# Risk Assessment Scoring

- To rank risks, consider HVA type methodology
  - **Probability**
    - 3 = High frequency event (e.g., every 1-3 years)
    - 2 = Moderate frequency event (e.g., every 3-10 years)
    - 1 = Low frequency event (> once every 10 years)
  - **Consequences**
    - 3 = High consequence event
    - 2 = Moderate consequence event
    - 1 = Low consequence event
  - **Preparedness**
    - 3 = Poor preparedness
    - 2 = Moderate Preparedness
    - 1 = Good Preparedness

Risk Matrix (based on scoring of Applicable Threat Scenarios)				
<b><i>Probability</i></b> <ul style="list-style-type: none"> <li>• 3 = High frequency event (e.g., every 1-3 years)</li> <li>• 2 = Moderate frequency event (e.g., every 3-10 years)</li> <li>• 1 = Low frequency event (&gt; once every 10 years)</li> </ul>	6-7 High Risk		8-9 Critical Risk	
	3 Low Risk		4-5 Moderate Risk	
	Minor	Moderate	Serious	Major Catastrophic
	<b><i>Consequences</i></b>			






# Closing Meeting

Lead	Lead with positives and strengths of existing program
Cite	Cite the highest risks and explain why
Provide	Provide suggested strategies for improvement
Offer	Offer insight into what to expect in report
Request	Request any additional information needed
Confirm	Confirm timeline for submission of report



The background of the slide is a dark, textured surface covered with numerous question marks of varying sizes and shades of gray and blue. One question mark in the center-left is significantly brighter and more prominent than the others, appearing almost white with a yellowish glow. In the upper-left corner, there is a dark brown circular overlay with a thin white border.

## Questions & Discussion



# Security Management Consulting: Preparing the Assessment Report

# Common Types of Reports

Security  
Assessment  
Report

Design  
Concept  
Report

Architectural  
Design Phase  
Report

Peer  
Review  
Report

Forensic  
Reports



# Typical Contents of Assessment Report

- **Front Matter**
  - **Outside Cover**
  - **Inside Cover**
  - **Acknowledgements**
  - **Table of Contents**
  - **Executive Summary**
  - **Introduction and Scope**



# Typical Contents of Assessment Report

- **Main Body of Report**
  - **Description of Facilities**
  - **Description of Existing Security Program**
  - **Risk Analysis**
  - **Consultant's Evaluation and Opinion**
  - **Findings and Recommendations**

# Typical Contents of Assessment Report

- **Attachments**
  - **Summary of Recommendations and Costs**
  - **Appendices**
  - **Crime Forecast Reports**
  - **Lighting Survey Results**
  - **Sources of Products and Services**





# Report Writing Tips

- Understand the importance of the report
- Consider who may be reading the report
- Write the report specifically for this client and this project
- Start writing early
- Write simply and clearly
- Always have the report reviewed by your “editor” before sending to the client

# Report Writing Tips

- Define unfamiliar terms and concepts
- Use terms consistently
  - Security Room
  - Security Monitoring Center
  - Security Control Room
  - Security Office
  - Security Dispatch
  - Security Command Center
  - Security Operations Center

# Report Writing Tips

## Use facts to make direct, powerful statements

### Weak Statement

“Most of the other buildings in downtown Portland have security in the lobby.”

### Powerful Statement

“Of the 47 Class A office buildings that we surveyed in the downtown Portland area, 43 had a security officer stationed full-time in the building lobby.”

### Weak Statement

“The theft of laptop computers has increased quite a bit in recent years.”

### Powerful Statement

“There were 25 thefts of laptop computers in 2018, compared to 5 thefts of laptop computers in 2017.”



# Avoid Common Mistakes

Focusing only on the negative

Having bad facts  
(misspelled names, bad math)

Confusing opinions with facts

Using sarcasm or humor in report

Overstating or exaggerating conditions

Making personal attacks on people or organizations



# Avoid Common Mistakes

- **Providing inaccurate cost estimates**
- **Overdoing it with fonts, colors, and graphics**
- **Including unnecessary material to “bulk up” report**
- **Using content owned by others without permission**
- **Copying content from another report and leaving previous client’s name on it**





# Automated Report Tools

- ✓ Can be effective if used properly
- ✓ “Check-list” approach can allow you to miss the big picture
- ✓ Can encourage the use of canned solutions



# Report Writing

It gets easier after the first 100 or so.....



# Questions & Discussion







# Executing a Technical Security Project



# The Process



- ✓ **Requirements Analysis & Recommendations 10%**
  - Site Survey – Interviews – Document Review – Report
- ✓ **Design/Documentation of Technology Elements 45%**
  - Plans – Risers – Hardware Schedules – Details – Specs
- ✓ **Competitive Bidding 10%**
  - RFP/IFB – Pre-quals – Analysis – Award Recommendation
- ✓ **Construction Phase 35%**
  - Review Submittals – QC –
  - Test – Punch List - Acceptance

# Typical Players

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**Architect**

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**Engineers**

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**Other Trades (e.g. electrical, IT, landscaping, lighting)**

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**Manufacturers' Reps**

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**The Security Consultant**

---

**The Owner**

---

**Security Contractors/Integrators**

---

**Construction Manager**



# The Architect

- ✓ Brilliant, innovative
- ✓ Tireless problem solver
- ✓ Coordinates disciplines
- ✓ Details, details, details
- ✓ Participating in his/her creation
- ✓ Respects security knowledge (sometimes)
- ✓ Tolerates physical security
- ✓ Knows defensible space
- ✓ Advocates holistic approach
- ✓ Avoids design impact





# Engineers

- Key, motivated team member
- Job to do, does it
- Security knowledge varies – sometimes used in lieu of a security consultant (results vary)
- High voltage (Low voltage?)
- Network, data, IT proficient (?)



# The Technical Security Consultant

- ✓ Develops, identifies and interprets security requirements, constraints, and culture into complete system
- ✓ Needs owner input
- ✓ Integrates people, technology, and procedures while meeting codes
- ✓ Extracts value, justifies designs
- ✓ May work for the architect, the engineer or the owner
- ✓ Assumes complete blame
- ✓ Do not use “engineering” unless a licensed engineer (PE) in the state is on staff.





## The Owner

- Is the ultimate customer
- Who you want to sign off on security design basis
- Should not be put into the middle of any potential disputes
- Can hold you financially accountable for any mistakes



# Skill Sets For Technical Consulting

- ✓ Experience with the Application/Use of Electronic Security Equipment
- ✓ Connectivity of Equipment from Disparate Manufacturers
- ✓ Basic Knowledge of Network Infrastructure
- ✓ Report Writing Skills
- ✓ Conversant with Construction Document Preparation and Content
- ✓ CAD Drafting skills (or access to them)
- ✓ Knowledge of the Contractor Procurement and System Installation Processes

# If you don't have all the skills...

- ✓ Team with an independent design firm (IAPSC member)
- ✓ Attend manufacturers' training sessions
- ✓ Work with manufacturers' A&E liaisons
- ✓ Certify as PSP
- ✓ ASIS Facility Security Design Workshop (ASIS A&E Council)
- ✓ ASIS Physical Security Design Courses I, II and III





# Design Tools

- **2D or 3D CAD Design Software**
  - Traditional or BIM (Building Information Modeling)
  - TurboCAD, AutoCAD, Revit, MicroStation, MS Visio
  - Must be compatible/convertible (DWG TrueView) to what the rest of the Design Team is using
- **Security Symbols Set**
  - SIA/IAPSC Architectural Graphic Standard AG-01 v 3.1
  - Endorsed by ASTM Electrical Committee
- **Security Consoles/Furniture Layout**
  - Manufacturer's Design & Drafting Software





# Keeping Current

- ✓ **Networking**

- **ISC West - March 31-April 4, 2025**  
in Las Vegas, NV [iscwest.com](https://iscwest.com)
- **IAPSC Annual Conference - April 29 – May 2, 2025** in San Diego, CA  
[iapsc.org](https://iapsc.org)
- **Security Specifiers “Consult 2025”**  
Denver, CO  
October 3 – 6, 2025  
[securityspecifiers.com](https://securityspecifiers.com)

- ✓ **Equipment Knowledge**

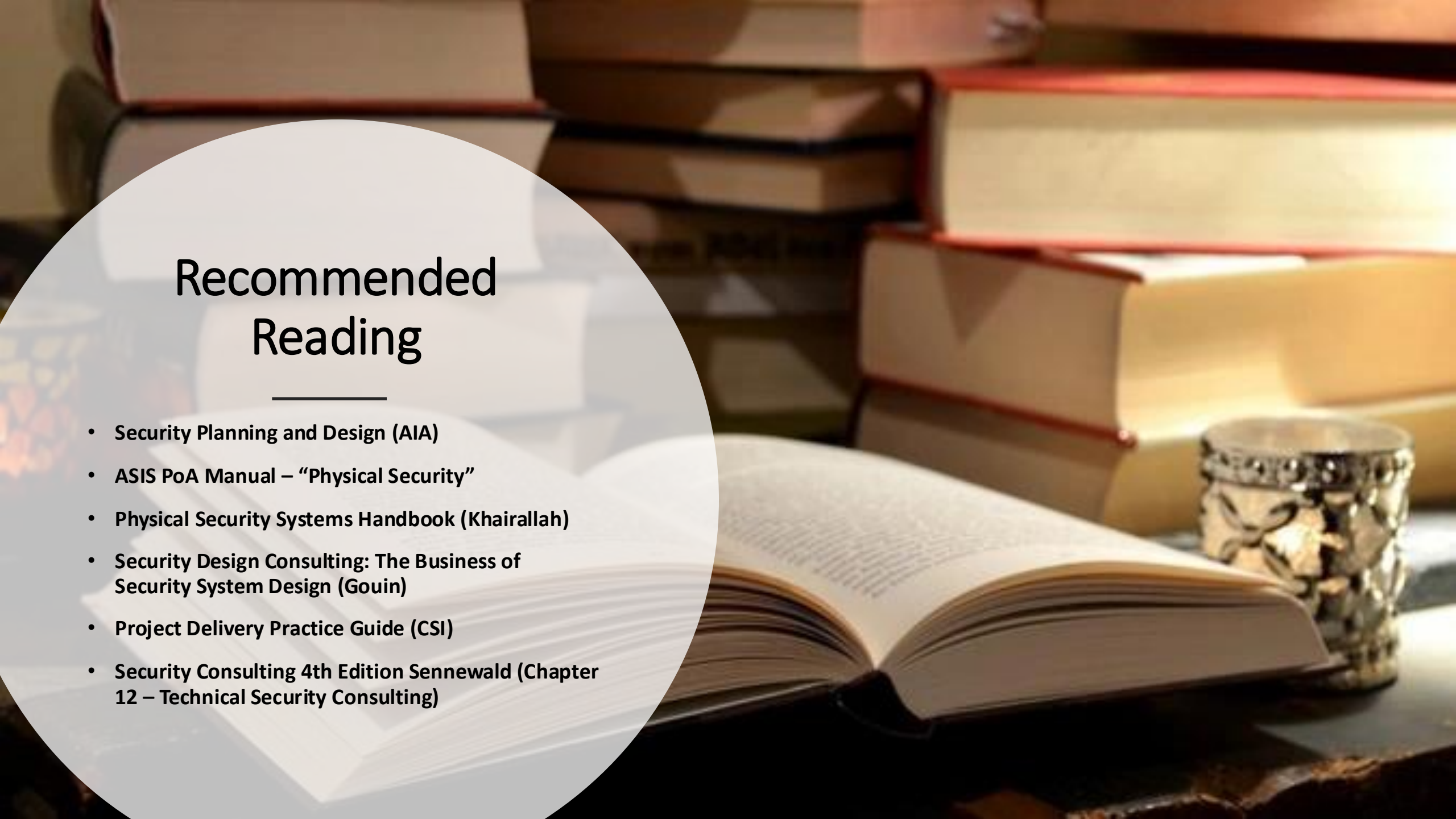
- **Manufacturer’s Conferences**



# Tips for Technical Consulting Success

- ✓ Follow communication protocols (always keep the architect/security director/project manager in the loop)
- ✓ Maintain good relationships with manufacturers (design reviews and access to MSRP costs for estimating)
- ✓ Report through the construction manager (with copy to other stakeholders) during construction
- ✓ Use “Written Communication.” Get sign-off/approval for your work in writing.
- ✓ Do not abdicate your responsibility to your sub-consultants or sub-contractors.





# Recommended Reading

---

- **Security Planning and Design (AIA)**
- **ASIS PoA Manual – “Physical Security”**
- **Physical Security Systems Handbook (Khairallah)**
- **Security Design Consulting: The Business of Security System Design (Gouin)**
- **Project Delivery Practice Guide (CSI)**
- **Security Consulting 4th Edition Sennewald (Chapter 12 – Technical Security Consulting)**



# Design Documentation

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- **Site & Floor Plans (Separate Set for Security)**
  - Location of security devices and equipment
  - Cable and conduit runs (if required)
- **Installation Details**
  - Door Types
  - Camera Mounting
  - SOC Layout
- **Riser Diagrams**
  - Different Subsystems (Access Control, Video, Intercom)
- **Security Equipment Schedules**
  - Coordinated with Architectural Door Hardware Schedule



A hand holding a pencil is positioned on the left side of the frame, pointing towards a document. The document contains a grid of small circles, some of which are filled with different colors. A large, semi-transparent circular graphic with a gradient from white to light orange is overlaid on the right side of the image, containing the title and list. 

# Specifications

- ✓ **Must be complete, accurate, and clear**
- ✓ **Consistent interpretation by Proposers for “apples to apples” comparison.**
- ✓ **Carries the most weight and is often considered to be the controlling contractual document in the construction set.**
- ✓ **CSI format**
- ✓ **Client’s Terms & Conditions – Sample Contract**



# Specifications

- **CSI Format**
  - **General Section 1.0** which is a description of the project and the basic parameters
  - **Products Section 2.0** which is the section that defines the acceptable products that meet the general design intent of the project
  - **Execution Section 3.0** which is intended to define the workmanship expectations, training, commissioning and turnover requirements
- **Functional or product specific (or equal)?**

Specifications



# Tips for Working Successfully with Others on a Project Team

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**Design Phase Communication Protocol – always keep the architect and security director in the loop**

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**Maintain relationships with manufacturers (design reviews and MSRP equipment costs)**

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---

**Construction Phase Protocol – always through the construction manager with copies to other stakeholders**

---

---

**Be cognizant of decreasing “safety nets” as the design progresses**

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**Use “Written Communication” at end of each phase to summarize delivery and uncertainties. Get approval for your work in writing.**

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---

**Do not abdicate your responsibility to your sub-consultants or systems contractors.**

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# Procurement

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- Consider vetting potential dealers with manufacturers
- IFB versus RFP
- Pre-Proposal Meeting
- No verbal responses, everything in writing
- Deadline for written questions/clarifications
- Response to questions/clarifications to all contractors
- Proposal submittals suggested
  - Compliance statement
  - Summary costs
  - Detailed costs, supported by data sheets
  - References



A man with a beard, wearing a dark suit, white shirt, and dark tie, is sitting at a desk. He has a stressed expression, with his hand on his forehead and his eyes closed. He is holding a pen over a large, rolled-up document. In the background, a woman in a dark dress is standing, and the office environment is visible with large windows.

# Analyzing Proposals

- **Assessing submittals**
  - **Verifying compliance statement and objections**
  - **Costs**
  - **Detailed costs, supported by data sheets**
  - **References**
  - **Warranty & Small Print**
- **Leveling**
  - **Client Procurement Rules**
  - **Spreadsheet**



An overhead view of a construction team meeting around a large table. Several people are gathered around the table, looking at large blueprints. One person is holding a white hard hat, and another is holding a blue hard hat. The table is covered with various documents, including blueprints, a calculator, a laptop, and a small potted plant. The scene is brightly lit, and the overall atmosphere is professional and collaborative.

# Construction Phase

- ✓ Pre-Construction/Kick-off Meeting
- ✓ Submittal Package #1
  - ✓ Data sheets, shop drawings, wiring pathways, terminations
- ✓ Submittal Package #2
  - ✓ Implementation Plans – Training Plan, Data Conversion, Commissioning, Testing
- ✓ Testing & Punch Listing
- ✓ Submittal Package #3
  - ✓ Final Record/As-Built Drawings
  - ✓ Operating & Maintenance Manual
  - ✓ Warranty Information



A large construction crane is silhouetted against a bright, orange-hued sunset sky. The crane's long jib extends diagonally across the upper half of the frame. Below the crane, the skeletal framework of a building under construction is visible, with several workers silhouetted as they work on different levels. The overall scene conveys a sense of active construction during the day's end.

# Construction Phase

- ✓ **Other Consultant Services**
  - ✓ **Construction Site Reviews (conduct one early)**
  - ✓ **Responses to Requests for Information/clarification (RFIs)**
  - ✓ **Management of Change Orders (don't want them but they happen)**
  - ✓ **Invoice Approval**
  - ✓ **Commissioning and Close Out**
  - ✓ **Post Construction Activities**





# Recommended Reading

- **Security Planning and Design (AIA)**
- **ASIS PoA Manual – “Physical Security”**
- **Physical Security Systems Handbook (Khairallah)**
- **Security Design Consulting: The Business of Security System Design (Gouin)**
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# QUESTIONS & DISCUSSION





# Executing a Forensic Security Project



# Basic Rules

- ✓ Fewer than 2% of cases go to trial, and many can be “won” or “lost” with your report and/or deposition.
- ✓ Only accept cases for which you are imminently qualified – Don’t go outside your area of expertise
- ✓ Credibility is very important
- ✓ Consistency is very important





# Basic Rules

- **Always tell the truth**
- **Have professional ethics**
- **Know your facts inside and out**
- **Over prepare rather than under prepare**

# First Step: Contact



- Telephone, e-mail, fax, letter (respond within 24-hours)
- Use intake sheet / form
- “Without giving me any privileged or confidential information, please give me the basic facts of what happened.”
- Is this case right for you?
- No conflicts of interest?
- What does attorney want you to do?
- Your comfort level with the inquiring attorney?



# Contact

- If you decline a case, notify the attorney in writing, without stating specifically why you declined. Suggest attorney immediately retain another security consultant - you may want to refer a colleague you know is qualified
- Build a network that you refer cases to – most will then also refer cases to you.





# Response Letter/Package

- Cover Letter
- Curriculum Vitae (C.V.)
  - 100% factually accurate – no puffery or exaggerations
  - Keep it current – date each page
- Fee Schedule, Agreement, W-9
- List of Documents / Materials Requested

## Fee Schedules

Schedule Name:

aetna

New...

Delete...

Print...

Code	M1	M2	Description	Amount	Allowed	Disallow
00000			No Adjustment Necessary no charge	\$0.00	\$0.00	<input type="checkbox"/>
1			X-Ray Copy	\$32.53	\$32.53	<input type="checkbox"/>
1026M			L&I Final Report	\$35.00	\$35.00	<input type="checkbox"/>
1039M			Therapy Note form	\$15.00	\$15.00	<input type="checkbox"/>
1040M			Accident Report	\$35.00	\$35.00	<input type="checkbox"/>
1041M			Re-Opening Application	\$35.00	\$35.00	<input type="checkbox"/>
1044M			Remote Physical Medicine	\$38.00	\$38.00	<input type="checkbox"/>
1052M			Deposition	\$0.00	\$0.00	<input type="checkbox"/>
1056M			LI Special Supplementary Report	\$35.00	\$35.00	<input type="checkbox"/>
1063M			Out-of-State Physical Exam	\$35.00	\$35.00	<input type="checkbox"/>
111111			Out-of-State Physical Exam	\$38.00	\$38.00	<input type="checkbox"/>
2030A			Initial Exam - Routine	\$45.00	\$45.00	<input type="checkbox"/>
2031A			Initial Exam - Extended	\$95.00	\$95.00	<input type="checkbox"/>

## Fee Schedule

- You are hired for your integrity and your knowledge – you are paid, however, for your time (not your testimony or your opinions)
- Charge as an attorney would – reading depositions and other written materials, travel time (portal to portal), lodging, meals, photocopying, preparation time for deposition or trial, telephone calls, etc.
- ALWAYS** use written fee schedule and Contract – don't start without them!



Exit



# You're Hired!

- **NEVER** start work until you receive a signed contract and a retainer check.
- Everything you do will be “privileged” and “confidential” – treat the material as such
- However, if you are later disclosed or designated as an expert, everything in your file will be discoverable by the other side, including correspondence to / from the attorney you are working for, plus any notes you may have made – be warned!
- State laws differ on privileged communications





# You're Hired!

- **Organize**
  - - Date stamp everything received
  - - Filing and locating case material
  - - Case status and scheduling
  - - Federal Rules of Civil Procedure 26a(2)(B)
- **Assess the case utilizing the IAPSC Best Practice #2 – *Forensic Methodology* found on the IAPSC website ([www.iapsc.org](http://www.iapsc.org))**
- **Daubert Challenges**

# Dealing With Attorney

- Document everything
- Telephone conversations don't exist
- E-mail exists only if you save a printed copy – and that does not confirm delivery
- Don't be railroaded into opinions



# Selling Forensic Consulting Services

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- Expert witness referral services (TASA, etc.)
- Internet expert witness databases (IAPSC, JurisPro, etc.)
- Develop an internet website
- Ads/classified ads in local legal publications / bar journals - national in TRIAL, ABA Journal
- Publish to / speak before attorneys
- Identify litigating attorneys and send them an introductory letter and one page biography
- Best Source – referrals and repeat retentions





# Final Words

- NEVER write a report unless specifically requested by the attorney who retained you. Never deliver a written report, or appear for testimony, unless you are paid current or in advance for your anticipated time / expenses
- Remember – as a testifying expert everything in your file including your billing statements and correspondence with the attorney who retained you, along with any notes you have made, is discoverable by the opposing side

# Final Words

- ✓ If you don't want to see something displayed to a jury, don't write it, or say it on your website or in your advertising
- ✓ When the opposing side can't undermine your knowledge, your logic, or your opinions – they will attack YOU!
- ✓ Be Prepared!



# Final Words

- Don't plan on living on your expert income for at least two years; have another source of income!
- Don't take cases that are not in your field of expertise
- Don't let attorneys push you into opinions you didn't come up with on your own







# QUESTIONS & DISCUSSION

A photograph of a breakfast table. In the foreground, a white coffee cup sits on a saucer. Next to it is a stack of folded newspapers. To the right, a small white plate holds two golden-brown pastries. The background is blurred, showing a window with sunlight and some greenery. A large, semi-transparent white circle with a thin black outline is positioned on the right side of the image, partially overlapping the text.

**BREAK**

Tuesday, March 28, 2023

Timeframe	Session	Subject
8:30 AM	Intro	Welcome & Introductions
8:45 AM	Session 1	The Business of Security Consulting
9:15 AM	Session 2	Establishing and Operating a Consulting Practice
10:30 AM	BREAK	
10:45 AM	Session 3	Security Consulting Practice Areas
12:00 PM	LUNCH	
1:00 PM	Session 4	Getting Business & Attracting Clients
2:00 PM	Session 5	Executing a Consulting Assignment
3:00 PM	BREAK	
3:15 PM	Session 6	<b>Avoiding Common Mistakes &amp; Pitfalls</b>
4:00 PM	Session 7	Summary & Wrap-Up



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The background image shows a person's lower legs and feet as they step onto a series of stone steps that lead into a body of water. The person is wearing blue pants and white sneakers. The water is dark and rippled, and the steps are made of rough, grey stone. The overall scene suggests a journey or a path leading into the unknown.

# Session 6: Avoiding Common Mistakes and Pitfalls

A close-up photograph of a person's hands holding a white rectangular sign. The person is wearing a dark brown suit jacket over a light-colored shirt. The sign is held horizontally and features the word "Ethics" in a large, bold, black serif font. The background is slightly blurred, focusing attention on the sign and the person's hands.

**Ethics**





## **CODE OF CONDUCT AND ETHICS**

- ✓ **Members will view and handle as confidential all information concerning the affairs of the client.**
- ✓ **Members will not take personal, financial, or any other advantage of inside information gained by virtue of the consulting relationship.**
- ✓ **Members will inform clients and prospective clients of any special relationship or circumstances that could be considered a conflict of interest.**
- ✓ **Members will never charge more than a reasonable fee; and, whenever possible, the consultant will agree with the client in advance on the fee or basis for the fee.**
- ✓ **Members will neither accept nor pay fees or commissions for client referrals.**
- ✓ **Members will not accept fees, commissions or other valuable considerations from any individual or organization whose equipment, supplies or services they might recommend in the course of providing professional consulting services.**
- ✓ **Members will only accept assignments for and render expert opinions on matters they are eminently qualified in and for.**

# Real World Challenges

- It sometimes requires real discipline to keep from crossing ethical boundaries
- Many situations come up quickly and unexpectedly
- It's natural to want to help those who have helped us or who we like
- When money is tight, it can be tempting to compromise

# Scenario #1

Acme Security Company provides security guard services to ABC Industries. ABC is in need of a consultant, so Acme refers them to John Able, an independent security consultant who Acme has known for years.

John conducts a security assessment and determines that the client can be far better served by another guard company, which will cause Acme to lose the ABC Industries contract.

Should John hold off on recommending any changes because Acme referred him the client in the first place?







## Scenario #2

**John Able, an independent security consultant, is hired to design and specify a new access control system for ABC Industries. A formal RFP is issued to six local integrators, and five respond back with bids. An bid evaluation is conducted, and it is determined that Zippy Systems has submitted the best overall bid.**

**Coincidentally, Zippy Systems is owned by John's brother-in-law. What, if any, actions should John take to maintain his independence in this situation?**



## Scenario #3

John Able, an independent security consultant, provides ongoing services to ABC Industries. During this time, he has become friends with Stan, ABC's longtime Security Manager.

John gets a new client, XYZ Plastics, who is actively recruiting a new Security Manager. John thinks Stan would be perfect for the job.

Does John refer Stan to XYZ Plastics, possibly causing ABC Industries to lose their valued employee?



## Scenario #4

Kathy Doe retired as a police officer and started her security consulting practice six months ago. It has been very slow going and Kathy is now desperate for income. An opportunity comes along for Kathy to develop a comprehensive security plan for a major hospital in her city.

Kathy has never developed a security plan and has absolutely no experience in hospital or healthcare security.

Should Kathy accept this engagement?



# Scenario #5

John Able, an independent security consultant, provides ongoing services to ABC Industries. ABC asks John to provide a proposal to develop a workplace violence training program, and says that they have \$50,000 in their budget to accomplish this.


John has developed numerous training programs of this type and typically charges around \$15,000. This is considered to be a reasonable fee for this scope of work.

Does John submit a proposal for \$15,000, or for \$48,000 knowing that this is just under ABC's allotted budget?



# Common Mistakes Made by New Consultants



A blurred background image of a business meeting. Several people in professional attire (suits, blouses) are gathered around a table. One person is holding a tablet, another a smartphone, and a coffee cup is visible. The scene is brightly lit, likely from a window.

# Common Mistakes

- ✓ **Thinking that previous job title or past relationships will sustain you as a consultant**
- ✓ **Not clearly defining your service offerings – trying to be everything to everyone**
- ✓ **Thinking that your previous experience is all you need and that you have nothing to learn**
- ✓ **Overestimating income and underestimating expenses**
- ✓ **Not having enough money on hand to weather the dry periods**



# Common Mistakes



- ✓ **Charging too little**
- ✓ **Becoming overly reliant on a single client or service offering**
- ✓ **Wasting resources pursuing opportunities that you have little chance of winning**
- ✓ **Succumbing to discouragement and the feeling of isolation**

# The Good News

- Most of us started exactly where you are and now have thriving consulting practices – if we can do it, so can you
- Most established consultants have more work than they can handle
- It gets progressively easier as you get established and develop a reputation
- Extremely satisfying and financially rewarding business for those with the right skills

The background of the slide features several overlapping, slightly crumpled pieces of light-colored paper. Each piece of paper has a large, bold, black question mark printed on it. The papers are arranged in a way that creates a sense of depth and layering. A solid purple horizontal band is superimposed over the center of the image, serving as a backdrop for the title text.

# QUESTIONS & DISCUSSION



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# Session 7: Summary and Wrap-Up





# Summary

## Take-Away #1

- **A security consulting practice needs to be set-up and run as a business with the appropriate financial controls in place**



# Summary

- **Take-Away #2**
- **Have a clear idea of what services you will provide and the types of clients you will serve before starting your practice**



# Summary

- **Take-Away #3**
- **Have a proactive marketing plan in place and take daily action to acquire business**





# Summary

- **Take-Away #4**
- **Know your operating costs and charge adequate fees to cover your overhead and make a reasonable profit**





# Summary

- **Take-Away #5**
- **Expect peaks and valleys in your income stream and have a plan in place to survive the dry spells**





# Summary

- Take-Away #6
- Constantly be renewing and expanding your skills



# Summary

- **Take-Away #7**
- **Look for opportunities to expand your service offerings by teaming with other consultants**







# Summary

- **Take-Away #8**
- **Don't become overly reliant on any one client or only one service offering**





## Summary

- **Take-Away #9**
- **Strive to act in the client's best interests and to always exceed client expectations**

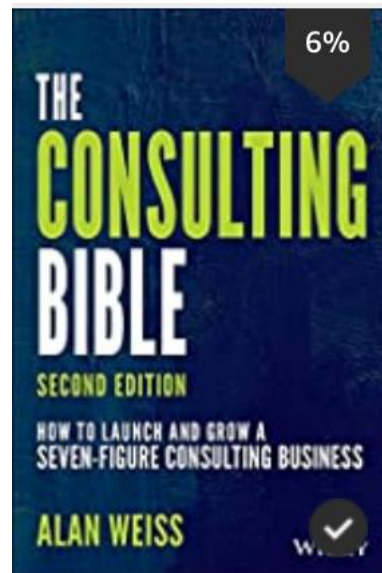
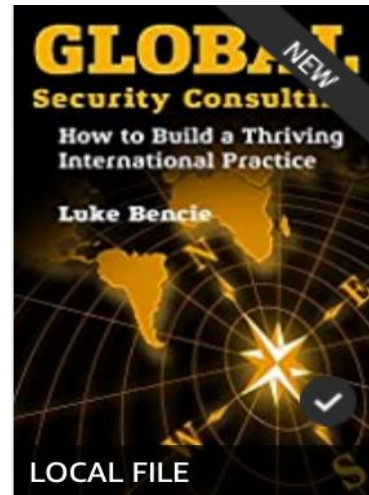


# Summary

- Take-Away #10
- Cherish your reputation and never do anything that would compromise your integrity



# Resources





# Credentials







# Certified Security Consultant

- Issued by IAPSC
- Only credential specific to independent security consultants
- Become part of elite group of security professionals
- Seeing as requirement in some client RFPs

# Certified Protection Professional

- Issued by ASIS
- “Gold standard” for security professionals
- Demonstrates knowledge of all areas of security management.
- Requirement in many client RFPs



# Physical Security Professional

- Issued by ASIS
- Demonstrates specialized knowledge of physical security.
- Increasingly seeing as requirement in client RFPs





A background image showing a business meeting. Several people in professional attire are gathered around a table. One person is holding a tablet displaying a document with charts and text. Another person is holding a white coffee cup. The scene is brightly lit, suggesting an office or conference room environment.

# Membership in IAPSC

- **Benefits of Joining IAPSC**
- ***Educational and Networking Opportunities***
- ***Listing in Online Directory***
- ***RFP Distribution Service***
- ***Partnering Opportunities***
- ***Best Practices Guidelines***
- ***Other Member Benefits***

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# QUESTIONS & DISCUSSION





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