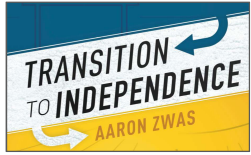


Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
1	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 1: Update your current résumé.	29	
2	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 2: Write down the standard set of business processes that you participate in.	29	
3	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 3: Jot down the metrics that you measure in your job.	29	
4	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 4: Make a list of common challenges	30	
5	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 5: Describe how to do that work better	30	
6	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 6: Write down anything else that is related to the success of your work but not controlled by your team.	30	
7	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Step 7: List the different types of businesses you have worked in	30	
8	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Complete a second draft	31	
9	1: DiCE: Define Your Consulting Plan	Part 1: Create Your Expertise Sketch		Complete a third draft	31	
10	1: DiCE: Define Your Consulting Plan	Part 2: Define Your Value-Add		Create 1 - 3 different versions of value add statements	32	
11	1: DiCE: Define Your Consulting Plan	Part 2: Define Your Value-Add		Go through several drafts as needed	32	
12	1: DiCE: Define Your Consulting Plan	Part 3: Create Your New Title and Description		Create 3 - 5 different versions of title and descriptions	34	
13	1: DiCE: Define Your Consulting Plan	Part 3: Create Your New Title and Description		Go through several drafts as needed	35	
14	1: DiCE: Define Your Consulting Plan	Part 3: Create Your New Title and Description		Review with trusted people for feedback	35	
15	1: DiCE: Define Your Consulting Plan	Part 3: Create Your New Title and Description		Google your title and description	35	
16	1: DiCE: Define Your Consulting Plan	Part 4: Define Your Market		First draft	36	
17	1: DiCE: Define Your Consulting Plan	Part 4: Define Your Market		Second draft	36	
18	1: DiCE: Define Your Consulting Plan	Part 5: Get a Life: Create Foundational Marketing Materials		Create your bio	38	
19	1: DiCE: Define Your Consulting Plan	Part 5: Get a Life: Create Foundational Marketing Materials		Create your first draft website	38	
20	1: DiCE: Define Your Consulting Plan	Part 5: Get a Life: Create Foundational Marketing Materials		Create (but don't publish) updated LinkedIn profile	40	
21	1: DiCE: Define Your Consulting Plan	Part 5: Get a Life: Create Foundational Marketing Materials		Pause and then review + update your materials	40	



Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
22	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Financially	Accountant review	45	
23	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Financially	Review monthly budget	45	
24	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Financially	Year in the bank	45	
25	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Mentally	Identify good places for working in public	49	
26	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Mentally	Plan regular dates with friends and family	50	
27	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Mentally	Take first baby steps on interests and hobbies	50	
28	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Mentally	Start talking about independent work with those who do it already	50	
29	2: Create Your Prep Plan	Part 1: Prepare Yourself	Prepare Yourself Mentally	Define exercise routine	51	
30	2: Create Your Prep Plan	Part 2: Prepare Your Family and Friends		Define for yourself known challenges and opportunities in making the transition	53	
31	2: Create Your Prep Plan	Part 2: Prepare Your Family and Friends		Define lifestyle improvements for you and your family that would be part of Independence	53	
32	2: Create Your Prep Plan	Part 2: Prepare Your Family and Friends		Add rows for each person with whom you should talk	53	
33	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Prepare your Gerber org chart	57	
34	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Create a legal entity, such as an LLC or DBA	58	
35	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Create a new bank account for your business	58	
36	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Consider setup of a business credit card	58	
37	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Set up financial tracking software	58	
38	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Review entire T2i Plan with an accountant (again, if necessary)	59	
39	2: Create Your Prep Plan	Part 3: Prepare Your Organization		Define your approach for healthcare. Begin shopping, if necessary.	59	
40	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Review and refine DiCE Plan	61	
41	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Define your brand name	61	
42	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Design your brand logo	61	
43	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Build your "good enough" website and publish to branded URL	62	
44	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Set up your branded email account	63	
45	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Update your LinkedIn Profile (but don't publish it yet!)	63	
46	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Set up your blog platform (optional)	64	
47	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Set up your Twitter account (or other industry appropriate social platform)	64	

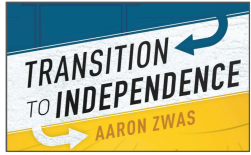


Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
48	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Obtain business cards	64	
49	2: Create Your Prep Plan	Part 4: Prepare Your Brand		Build basic templates (invoice, presentation, proposal)	64	
50	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	How to BE in Your Home Office	Create a home office routine	68	
51	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	How to BE in Your Home Office	Define specific working (and living!) hours	70	
52	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Update your mobile phone plan for more minutes	75	
53	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Invest in a good headset	75	
54	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Look into upping the speed of your home internet	75	
55	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Invest in a backup solution for your laptop	75	
56	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Identify go-to spaces outside of the home	75	
57	2: Create Your Prep Plan	Part 5: Prepare Your Workspace	Your Home Office Checklist	Identify go-to spaces in the home	75	
58	2: Create Your Prep Plan	Part 5: Prepare Your Workspace		Look into and find preferred for=pay office spaces, like coworking	76	
59	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Confirm your objectives	85	
60	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Set up keyword alerts	87	
61	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Follow professional sources on social platforms	87	
62	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Schedule 30 minutes per day for professional reading	87	
63	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Begin sharing and commenting on content, with focus on LinkedIn	88	
64	3: Transition with Confidence	Part 1: Prime the Pump	Start Producing Ongoing Content	Write first draft content of your own (but don't publish yet)	88	
65	3: Transition with Confidence	Part 1: Prime the Pump	Develop Individual Connections	Step 1: Build a list of contacts	89	
66	3: Transition with Confidence	Part 1: Prime the Pump	Develop Individual Connections	Step 2: Draft a template email and send to appropriate contacts	89	
67	3: Transition with Confidence	Part 1: Prime the Pump	Develop Individual Connections	Step 3: Schedule and meet in person	90	
68	3: Transition with Confidence	Part 1: Prime the Pump	Develop Individual Connections	Step 4: Follow up with in-person and phone call meetings	90	

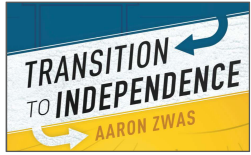


Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
69	3: Transition with Confidence	Part 1: Prime the Pump	Develop Individual Connections	Step 5: Repeat as necessary	91	
70	3: Transition with Confidence	Part 1: Prime the Pump	Attend Events, Groups, and Associations	Identify and attend appropriate networking events, which can include: Professional Associations, Industry-Specific Events, Networking Groups, General Networking Events	91	
71	3: Transition with Confidence	Part 2: Moonlighting and Part-Time Work		Confirm best practices for giving your current employer your best work	95	
72	3: Transition with Confidence	Part 2: Moonlighting and Part-Time Work		Confirm with family and friends any lifestyle changes needed to support moonlighting	96	
73	3: Transition with Confidence	Part 2: Moonlighting and Part-Time Work		Confirm key questions for assessing potential opportunities	98	
74	3: Transition with Confidence	Part 2: Moonlighting and Part-Time Work		On a per project basis: refine templates, create related content, solicit feedback, and use it all to search for the next set of clients.	99	
75	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	Confirm you are currently in good standing with your management team.	102	
76	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	Confirm all commitments have been honored or a suitable, transition plan can be established.	102	
77	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	Confirm your timing is good re: annual reviews and bonuses.	102	
78	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	As your employment contract permits, obtain: names and contact info of current colleagues, partners, and clients	102	
79	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	As your employment contract permits, obtain: templates, diagrams, or collateral from which you could learn	102	
80	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	As your employment contract permits, obtain: any actual work that showcases your talent, including high- level metrics	102	
81	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	As your employment contract permits, obtain: any personal content on your office computer or phone. Send it to your personal account well in advance of your official disengagement	102	

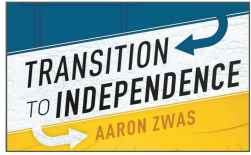


Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
82	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Your Final Prep	As your employment contract permits, obtain: a memento of some sort that you can look at to remind yourself of why you're doing this!	102	
83	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Be sure you are 100 percent clear on contractual responsibilities for both you and employer.	104	
84	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Be clear on the amount of standard pay, bonuses, sick leave, and vacations you are owed.	104	
85	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Be sure you know how your benefits work.	104	
86	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Commit to creating a strong transition plan for your replacement.	104	
87	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Prepare questions on opportunities for switching from employee to contractor.	104	
88	3: Transition with Confidence	Part 3: When to Leave and How to Do It	Prep for Last Words with Your Manager	Set a pre-defined limit for how much longer you're willing to stay before cutting the cord.	104	
89	4: Win and Sustain New Business	Part 1: Know Your Strategic Objectives		Understand your strategic objectives for client relationships	110	
90	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Know what you want before you go.	112	
91	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Review the company website and one or two social channels like Facebook.	112	
92	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Do the same for known competitors	112	
93	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Search for current events and news	112	
94	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Look up your interviewer on LinkedIn	112	
95	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Make note of your past experiences that would be most relevant to what you think are the client's needs.	112	
96	4: Win and Sustain New Business	Part 2: Get to Know a Potential Client	Meeting Prep	Draw up a short list of questions. They should range from the basic to the more probing.	112	
97	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Begin your proposal with a simple sentence (or two) describing the current state and the desired end state (or result) of your client.	114	
98	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Draw in details from your conversations.	115	

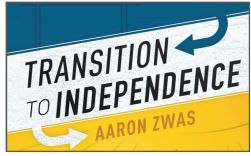


Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
99	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Confirm that the proposal is concise.	115	
100	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Confirm you are setting modest and real expectations	115	
101	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Set your price at least double the rate you would have received as a full-time employee.	115	
102	4: Win and Sustain New Business	Part 3: Frame up Your Offer and Submit Your Proposal		Send the proposal with the least friction possible, including as .PDF document.	116	
103	5: Adding Value Always	Part 1: Build Alignment		Communicate consistently	125	
104	5: Adding Value Always	Part 1: Build Alignment		Speak simply. Define your vocabulary.	125	
105	5: Adding Value Always	Part 1: Build Alignment		Form one version of the truth. Work to define a reference source for key data points, project status, and other inputs into your project	125	
106	5: Adding Value Always	Part 2: Fight Folklore		<i>See example in book</i>	126	
107	5: Adding Value Always	Part 3: Enable Success for Others		<i>See example in book</i>	128	
108	5: Adding Value Always	Part 4: Teach to Fish		<i>See example in book</i>	129	
109	5: Adding Value Always	Part 5: Understand the Bigger Picture		Attempt to understand the true scope of the work.	130	
110	5: Adding Value Always	Part 5: Understand the Bigger Picture		Ask client-side colleagues how your efforts fit into a larger initiative.	130	
111	5: Adding Value Always	Part 5: Understand the Bigger Picture		Maintain ongoing homework regarding your client and industry.	130	
112	6: Evolve and Grow	Part 1: Keep Score		Track quantitative details: timeliness of effort, budget / cost, quality of results (use specific data points when possible).	134	
113	6: Evolve and Grow	Part 1: Keep Score		Track qualitative details: Improved collaboration, better-enabled employees, improved in-house ability to manage future efforts	134	
114	6: Evolve and Grow	Part 2: Time Your Exit		Initiate your exit before your client does	134	
115	6: Evolve and Grow	Part 2: Time Your Exit		Say goodbye and be sure to get contact info from appropriate colleagues.	135	
116	6: Evolve and Grow	Part 3: Publish and Promote		Write a case study	136	
117	6: Evolve and Grow	Part 3: Publish and Promote		Obtain testimonials, when possible	136	
118	6: Evolve and Grow	Part 3: Publish and Promote		Publish to your owned channels	137	



Transition to Independence  
**T2i Plan Checklist**  
 www.T2iplan.com

Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

Ref	T2i Plan Step	Part	Tactic	Action	Book Page #	Your Status
119	6: Evolve and Grow	Part 3: Publish and Promote		Solicit industry content sources for additional publication (and exposure to potential new clients)	136	
120	6: Evolve and Grow	Part 3: Publish and Promote		Make small efforts to promote yourself to client stakeholders	137	
121	6: Evolve and Grow	Part 4: Build and Refine Your Templates		basic templates for agendas, meeting notes, and action and issue logs.	138	
122	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Project Plan:	138	
123	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Discovery and Findings:	139	
124	6: Evolve and Grow	Part 4: Build and Refine Your Templates		General-Purpose Presentations:	139	
125	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Proposal and Statement of Work:	139	
126	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Invoices	139	
127	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Case Studies	139	
128	6: Evolve and Grow	Part 4: Build and Refine Your Templates		Specialized templates	139	
129	6: Evolve and Grow	Part 5: Mind the Gaps		Enjoy your downtime between projects by LIVING life!	140	

