RISK • READINESS • RESILIENCE

SECURITY CONSULTING

GUIDE

Assess the exposure.
Prioritize the response.
Document the decision.

ASSESS | PRIORITIZE | ADVISE

Veteran's Strategic Solutions LLC

START HERE

How to Use This Guide

Read the core guide first. Then use the operating worksheets to validate the offer, scope an assessment, present the estimate, document the work, invoice the client and track referrals.

01 **VALIDATE** 02 **ASSESS** 03 **ADVISE** 04 **FOLLOW UP**

MODULE	PURPOSE
Core guide	Understand the buyer, minimum viable offer, startup requirements, pricing and first 90 days.
Startup checklist	Move from positioning and credentials to the first paid assessment.
Budget + estimate	Capture startup needs, direct costs, scope and delivered price.
Invoice + logs	Record assessments, decisions, deliverables, follow-up and referrals.
Compliance page	Confirm local rules, insurance, authority, confidentiality and field safety.

CLIENT OUTCOME

A documented security assessment with prioritized, practical recommendations.

Business Model — Security Consulting

Veteran’s Strategic Solutions LLC

August 2026

CORE GUIDE

1. The bet

01 OBSERVE **02** ANALYZE **03** PRIORITIZE **04** ADVISE

FACILITY WALKTHROUGH | Observe access, operations and exposure.

The core assumption that must be true: businesses and organizations in your market will pay for an outside assessment of their physical security, rather than assuming they are fine until something happens.

This is the hardest assumption of the three freelance lines, and the document should say so up front. Security is a purchase people make after an incident, not before. You are selling insurance against something that has not happened, to buyers who believe it will not.

A caution before anything else. Military or public-safety experience is real credibility with the public, but it is not automatically the credibility a corporate buyer is looking for. Military security experience and commercial physical security are related, not identical — access control, alarm and camera systems, workplace violence prevention, and liability exposure are their own body of knowledge. Be honest with yourself about which parts you can speak to today and which you would need to learn. A client who catches you out on that never comes back.

The fastest zero-budget test: ask five local business owners one question — “If someone walked into your building right now and refused to leave, what happens?” Most will not have an answer. Watch which ones look uncomfortable. Discomfort is the buying signal; a shrug is not.

The three biggest reasons it fails:

- No incident, no budget. Until something goes wrong, security spending is optional, and optional spending is the first thing cut in a small business.
- The buyer is hard to find in a smaller market. Companies with a dedicated security budget are generally larger than the businesses in your local market. Your real market may be the broader regional market, which means drive time.
- Advice carries liability. If you assess a facility, they follow your recommendations, and something still happens, you are named. This is the one line where insurance is not optional and where a poorly written report is a genuine risk to you.

CORE GUIDE

2. Who pays, in their own words

01 OBSERVE
02 ANALYZE
03 PRIORITIZE
04 ADVISE

The small business owner after an event. A break-in, a theft, an employee incident.

- “We got hit twice in six months.”
- “One of our people was threatened and we didn’t know what to do.”
- “Insurance is asking what controls we have.”

The organization with vulnerable people and no plan. Churches, schools, clinics, daycares.

- “We’ve talked about doing an active shooter plan for two years.”
- “We don’t lock anything and we probably should.”
- “Our insurer sent us a questionnaire we can’t answer.”

The property or facility manager. Cameras that do not record, doors that do not lock, no written procedure.

Where they are: chamber of commerce, church and school networks, insurance agents, and property managers. Insurance agents are your best referral channel by a wide margin — they see the questionnaires their clients cannot answer and they have a direct interest in those gaps being closed.

What triggers the buying decision: an incident, an insurance requirement, or a board that has finally decided to act.

CORE GUIDE

3. The smallest version you can charge for

01 **OBSERVE** 02 **ANALYZE** 03 **PRIORITIZE** 04 **ADVISE**

PRIORITIZED REPORT | Connect findings to practical next steps.

One product: the facility walkthrough and written report.

Two hours on site. You walk the building the way someone with bad intent would, then deliver a written report: what you observed, what it exposes them to, and a prioritized list of fixes split into “costs nothing,” “costs a little,” and “costs real money.”

The prioritized-by-cost structure is what makes it sell. Most security advice arrives as an expensive wish list and gets shelved. A list that starts with free changes gets acted on, and a client who acts on your report comes back.

Fastest path to the first paying customer: one free walkthrough for a church or nonprofit you already know, done properly with a real written report. That report becomes your sample, and organizations of that type talk to each other constantly.

CORE GUIDE

4. What it actually takes

01 **OBSERVE** 02 **ANALYZE** 03 **PRIORITIZE** 04 **ADVISE**

Licensing — verify this one before you sell anything. Many states regulate private security and private investigation work under a licensing board, and the line between “consulting” and “regulated security services” varies. Providing guards or investigative services is a different regulated activity from writing an assessment. Do not take my word or a website’s for this. Check licensing, zoning, and tax rules for your own city and state before starting.

Credentials that the buyer recognizes: ASIS International offers the Certified Protection Professional (CPP) and the Physical Security Professional (PSP). These are the recognized credentials in commercial physical security.

Both have experience prerequisites and exam fees — verify current requirements and costs at asisonline.org. Unlike the other lines, a credential here does real work, because the buyer is paying for judgment and has no other way to evaluate it.

Insurance is mandatory, not optional. Professional liability and general liability. Expect meaningfully higher premiums than a writing or detailing business because of the advice exposure — verify quotes; I would not guess a number for this line.

Item	Cheapest source	Approximate cost
Computer, camera, measuring tools	Owned or minimal	$0–$100
Report templates	Build from your existing branded template	$0
Reference standards	ASIS and CISA publish free guidance	$0
Professional liability insurance	Compare specialty brokers	verify — the largest line item
ASIS membership and credential	asisonline.org	verify current cost
Travel	Existing vehicle	fuel

CORE GUIDE

5. Pricing

01 **OBSERVE** 02 **ANALYZE** 03 **PRIORITIZE** 04 **ADVISE**

LEADERSHIP BRIEFING | Turn the assessment into a decision.

Tier	Offer	Price
Low	Two-hour walkthrough with written report	$500–$900
Mid	Full assessment — site survey, policy review, written plan, staff briefing	$2,500–$6,000

Tier	Offer	Price
Premium	Annual retainer — yearly reassessment, on-call advice, plan updates	$500–$1,500/month

Which maximizes early revenue: the low tier, priced at $600 and delivered fast. It is a number a small business can approve without a board vote.

The relationship worth building is with insurance agents, not end clients. An agent who trusts you refers continuously and costs you nothing to maintain.

CORE GUIDE

6. First 90 days

01 OBSERVE | 02 ANALYZE | 03 PRIORITIZE | 04 ADVISE

Days 1–30. Check licensing, zoning, and tax rules for your own city and state before starting. Get the answer in writing. Do one free walkthrough and produce a real report. Talk to three insurance agents.

Days 31–60. Sell two walkthroughs at $600. Do not advertise; sell through the agents and the referral you earned.

Days 61–90. One mid-tier assessment, or an honest decision that your immediate market is too thin and you expand to serve a broader regional market.

The one metric: referrals from insurance agents and past clients. Cold outreach does not work in this trade. If referrals are not appearing by day 90, the market is telling you something.

CORE GUIDE

7. Honest assessment

01 OBSERVE | 02 ANALYZE | 03 PRIORITIZE | 04 ADVISE

This line has the high ceiling and the slowest start. The ceiling is real because an annual retainer with a handful of organizations is stable, high-margin income that does not consume your body or vehicle. The slow start is equally real: the buyers are thinner in a smaller market, the licensing question has to be answered before you can quote, and the credential that would let you charge properly takes time to earn.

The honest sequencing is to let document writing pay the bills while this one builds. They share a customer type, and a security assessment is itself a written deliverable — the two lines feed each other more than they compete.

WORKSHEET 01

Startup Checklist

01 POSITION

02 PROTECT

03 SAMPLE

04 SELL

DONE	ACTION	OWNER / DATE / NOTES
☐	Define the assessment services included and excluded.	
☐	Select the client type and decision-maker to approach first.	
☐	Document relevant experience, credentials and proof of insurance.	
☐	Confirm licensing, zoning, tax and insurance requirements.	
☐	Build the intake form, walkthrough checklist and report template.	
☐	Prepare one anonymized sample assessment and recommendations page.	
☐	Set the base assessment scope, price and payment terms.	
☐	Meet referral partners and schedule the first walkthrough.	
☐	Deliver the first paid report and request a follow-up decision meeting.	

WORKSHEET 02

Equipment and Startup Budget Worksheet

01 FIELD

02 REPORT

03 COVER

04 CASH

ITEM	NEEDED?	ESTIMATE	ACTUAL	NOTES
Laptop / secure file storage				
Tablet / phone / camera				
Measuring / inspection supplies				
Report and proposal templates				
Website / printed leave-behind				
General liability / professional liability				
Credential / training costs				
Travel / existing vehicle				
Contingency				
TOTAL				

CONTROL COST

Separate must-have credibility, insurance and field tools from optional presentation upgrades.

WORKSHEET 03

Security Assessment Estimate Template

01 INTAKE

02 SCOPE

03 PRICE

04 APPROVE

CLIENT / FACILITY	WALKTHROUGH DATE	ESTIMATE #

SERVICE / DELIVERABLE	QTY	RATE	EXPENSE	AMOUNT
Intake and document review				
On-site security assessment				
Risk findings and priority report				
Leadership briefing				
Policy / plan review				
Travel				
Other				
			TOTAL	

SCOPE NOTE

Facility areas, interviews, records reviewed, deliverables, exclusions, deadline and approval: ________________________

WORKSHEET 04

Customer Invoice Template

01 CLIENT ____________

02 WORK ____________

03 TOTAL ____________

04 RECORD ____________

SELLER	CLIENT
Business: ____________________________ Address: _____________________________ Email: ________________________________	Organization: ________________________ Facility: _____________________________ Email: _______________________________

INVOICE #	SERVICE DATE	DUE DATE	STATUS

DESCRIPTION	QTY	RATE	AMOUNT
		Subtotal	
		Tax	
		TOTAL	

DELIVERY

Report, briefing, recommendations and acceptance notes delivered by: _______________________________

WORKSHEET 05

Facility Walkthrough and Job Log

01 AUTHORITY

02 OBSERVE

03 DOCUMENT

04 DELIVER

FIELD	DETAIL
Client / facility / point of contact	
Date / arrival / departure	
Written authorization / access limits	
Documents and interviews reviewed	
Exterior / perimeter observations	
Entry / access-control observations	
Operations / people / process observations	
Immediate concerns communicated	
Photo / evidence file location	
Report and briefing delivered	
Follow-up required	

WORKSHEET 06

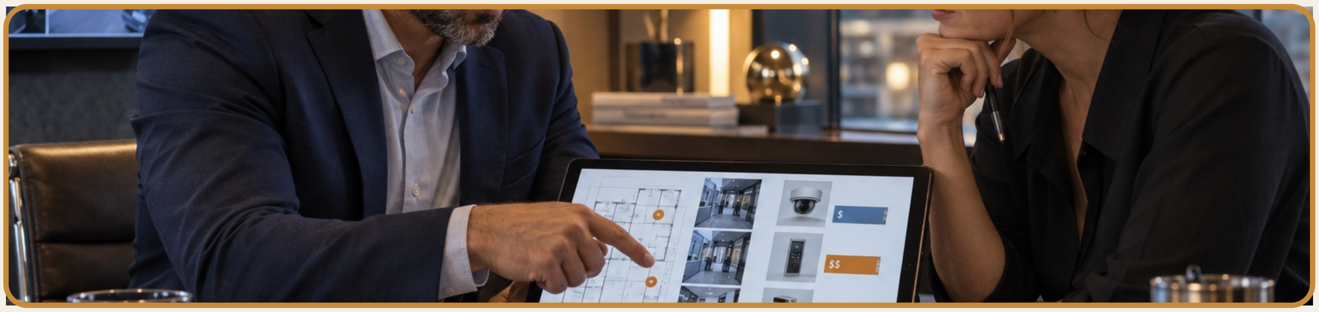
Lead and Referral Tracker

01 LEAD

02 DISCOVERY

03 ASSESS

04 REFER



REFERRAL NETWORK | Build trust with owners, insurers and professional partners.

DATE	ORGANIZATION / CONTACT	SOURCE	NEED	STATUS	NEXT ACTION

ONE METRIC

Paid assessments - count completed, paid engagements rather than conversations.

WORKSHEET 07

Compliance, Liability and Field Safety

01 RULES

02 AUTHORITY

03 PRIVACY

04 SAFETY

Check licensing, zoning, and tax rules for your own city and state before starting.

AREA	QUESTION TO ANSWER	STATUS / NOTES
Service scope	Which advisory, investigative or security services require a licence locally?	
Insurance	What general and professional liability coverage applies to the work?	
Authority	Who authorizes access, interviews, photography and document review?	
Confidentiality	How are facility data, images, findings and client records protected?	
Field safety	What conditions require stopping the walkthrough or notifying the client?	
Recommendations	How are scope, assumptions, limitations and client decisions documented?	
Records	Where are signed estimates, reports, delivery confirmation and follow-up retained?	

FINAL DASHBOARD

Your First 90 Days

01 DAYS 1-30

02 DAYS 31-60

03 DAYS 61-90

04 PAID WORK

WINDOW	COMMITMENT	RESULT / DECISION
Days 1-30	Define the scope, compliance questions, credentials and sample assessment.	
Days 31-60	Meet target clients and referral partners. Test the minimum paid offer.	
Days 61-90	Deliver paid assessments, refine the report and expand the practical market area if needed.	
Measure	Count completed, paid assessments and qualified follow-up opportunities.	

POSITION

Independent judgment, disciplined documentation and prioritized recommendations.