
ASSESS • REPORT • REFER

SELF-PROTECTION & RESILIENCY GUIDE

Separate the two offers.

Make findings actionable.

Stay inside the advisory line.

WALK | PRIORITIZE | REPORT | FOLLOW-UP

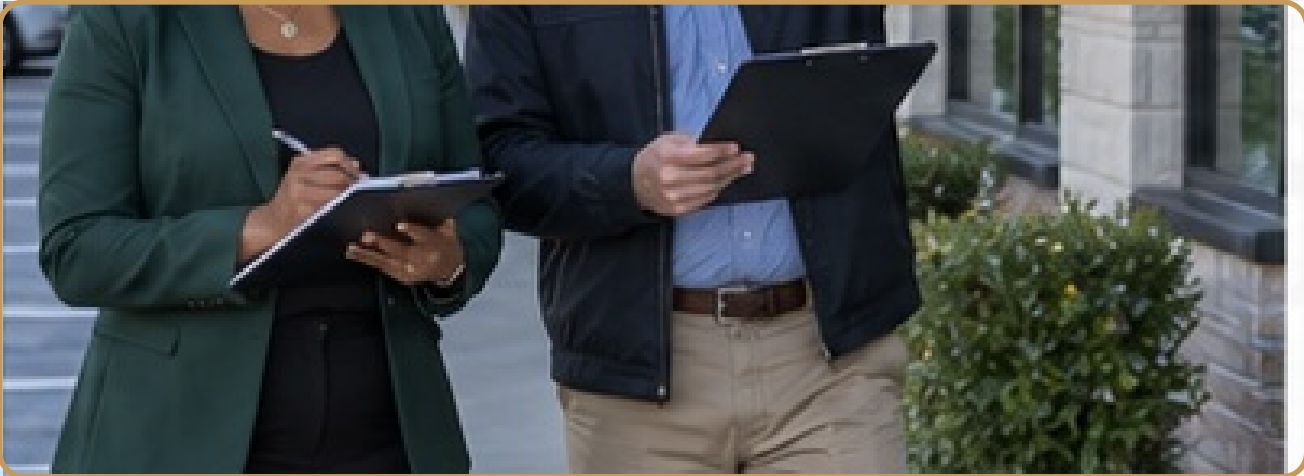
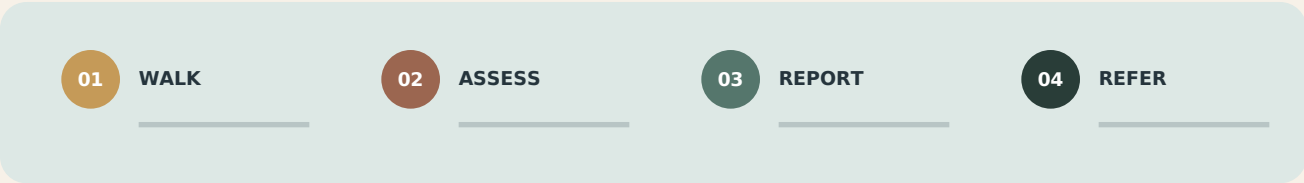
Veteran's Strategic Solutions LLC



START HERE

How to Use This Guide

Read the core guide first. Then use the worksheets to separate assessment from training, test demand, budget coverage and reporting tools, price walkthroughs and sessions, document authorization and boundaries, invoice clients, track paid assessments and repeat bookings, and control licensing, insurance, privacy, site, credential, therapy-boundary, referral, and client-safety risks.

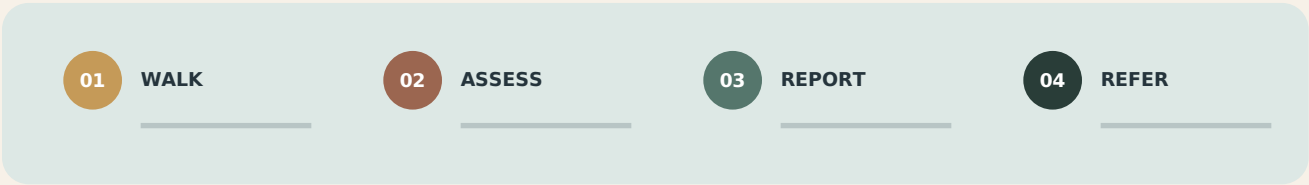


AUTHORIZED WALKTHROUGH | Confirm scope, decision-maker, site access, existing incidents, insurer requests, and advisory boundaries

PIECE	USE
Core guide	Test self-protection assessments and resiliency training as separate offers with separate buyers, scopes, risks, and metrics.
Operating kit	Use the checklist, budget, estimate, assessment agreement, invoice, tracker, and compliance page for every engagement.

CORE GUIDE 01

1. The bet



This is really two businesses and they should be priced, licensed and sold separately.

Self-protection — assessing and improving how safe a place or a person is. The core assumption: that an organisation will pay for an outside set of eyes and a written report it can act on and show to its insurer.

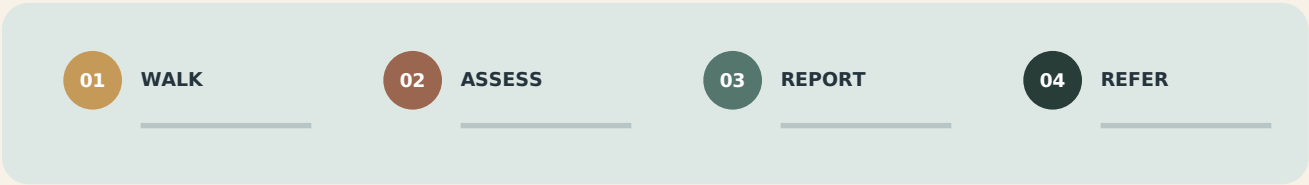
Resiliency — teaching people to hold up under pressure. The core assumption: that an employer will pay for training its staff cannot get free elsewhere.

The fastest zero-budget test, self-protection: offer three small businesses a free walkthrough in exchange for permission to use them as a reference. If nobody accepts a free assessment, nobody will buy a paid one.

BUSINESS LENS	CONTROL
Split	Price, license, scope, and sell self-protection and resiliency separately.
Report	Prioritize findings by no-cost, low-cost, and major-investment actions.
Boundary	Keep advisory and education work separate from guarding, investigation, therapy, diagnosis, and treatment.

CORE GUIDE 01

1. The bet Continued



The fastest zero-budget test, resiliency: ask five HR managers what they currently spend on wellbeing or stress training and who delivers it. If the answer is “the EAP does it and it’s included,” that is your competitor and it is free at the point of use.

Three reasons this fails:

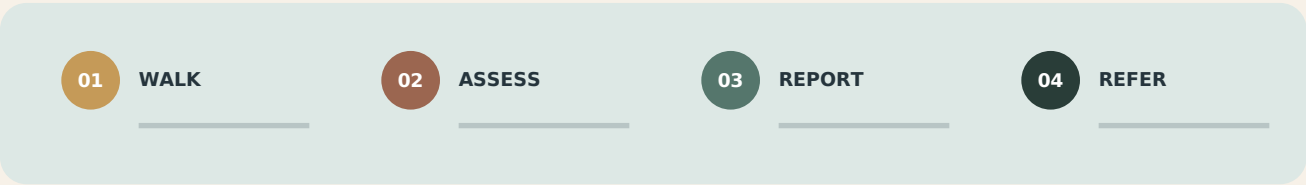
Check licensing, zoning, and tax rules for your own city and state before starting.

Free incumbents on the resiliency side. Army R2 Performance Centers run at 32 installations with sport psychology professionals, at no cost, for soldiers, families and DA civilians. Employee assistance programmes cover the civilian equivalent.

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CORE GUIDE 01

1. The bet Continued



No instrument. The national resilience training firms sell a proprietary assessment or a university brand. You have neither, and a workshop without one is a commodity.

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CORE GUIDE 02

2. Who pays, in their own words

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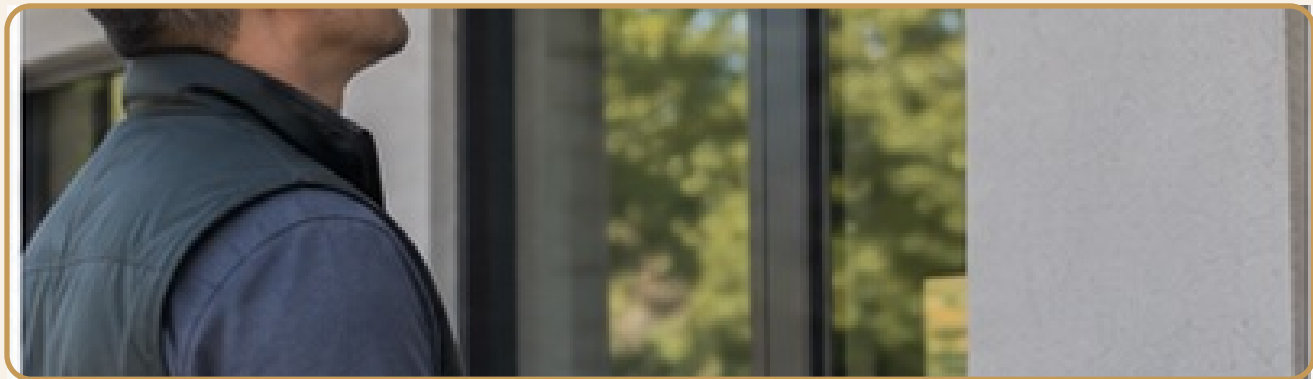
REFER

Self-protection:

“Our insurer wants to see that we’ve done something about the parking lot.” — the insurer is the real driver and the best referral channel

“We had an incident and the staff don’t feel safe.” — urgent, budget appears immediately

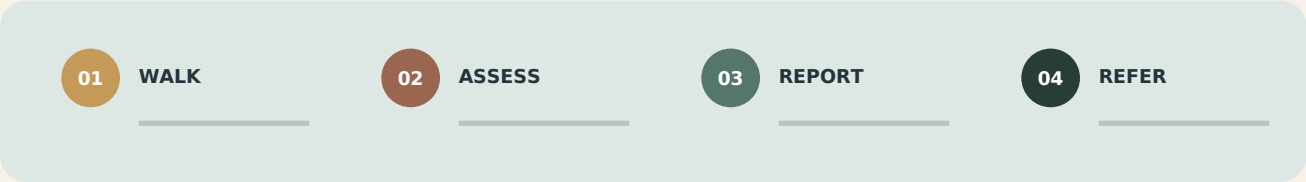
“We’re opening a second location and I don’t know what I don’t know.” — planning stage, unhurried, pays well



CONDITION REVIEW | Observe lighting, sightlines, access, parking, doors, cameras, procedures, and staff concerns without overstepping

2. Who pays, in their own words

Continued



Resiliency:

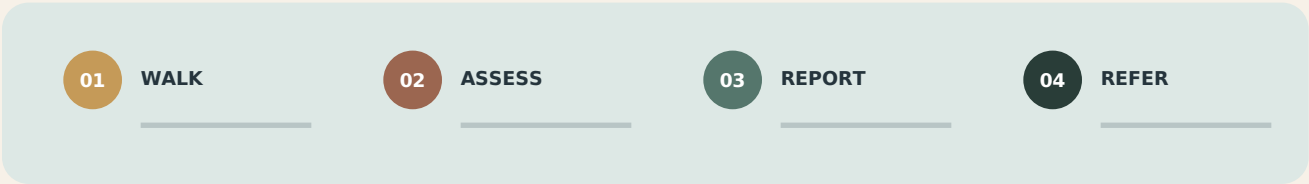
“Our people are burnt out and the engagement survey said so in writing.” — a number somebody has to answer for

“We need something for the leadership offsite.” — a slot to fill and a budget already allocated

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CORE GUIDE 03

3. The smallest version you can charge for



A two-hour walkthrough and a written report. Findings split into three columns: costs nothing, costs a little, costs real money.

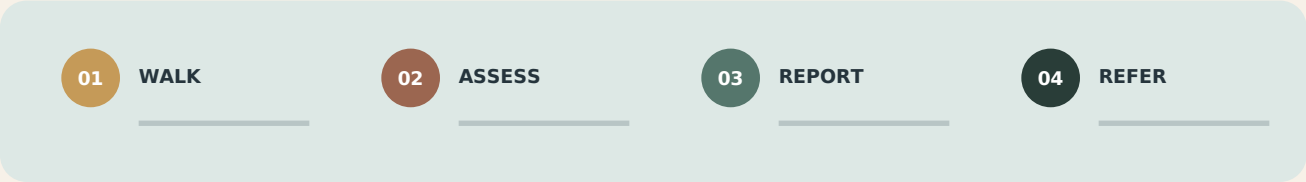
That three-column split is the whole product. It gives the client something to act on immediately, which builds trust, and it puts the expensive recommendations in front of them without appearing to sell.

For resiliency, the smallest sellable unit is one 90-minute session at a leadership offsite, delivered as a guest slot. It is low risk for the buyer and it is how you get the second booking.

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CORE GUIDE 04

4. What it actually takes — and the states give opposite answers



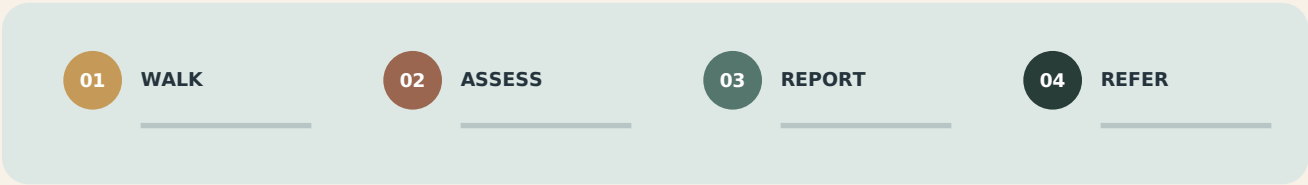
Check licensing, zoning, and tax rules for your own city and state before starting.

Resiliency, both states: no licence for training. The line you must not cross is the one into therapy. Training and education are unregulated; assessing, diagnosing or treating a mental health condition is licensed in both states. Put the boundary in writing in every engagement and refer out the moment it appears.

Staffing: advisory work is solo. Any guarding operation is a staffing business, not a consulting one, and belongs in a different model entirely.

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5. Pricing



Corporate training rates run roughly \$100–199 an hour, with a finished 60-minute instructor-led course priced at \$3,000–7,000. Price the deliverable, not the hour.

Insurance agents are the referral channel for the self-protection side, not the end client. They have every reason to want their insureds assessed and they talk to hundreds of businesses.

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CORE GUIDE 06

6. First 90 days, and the one metric

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

Days 31-60. Three free walkthroughs in exchange for references. Build the report template once.

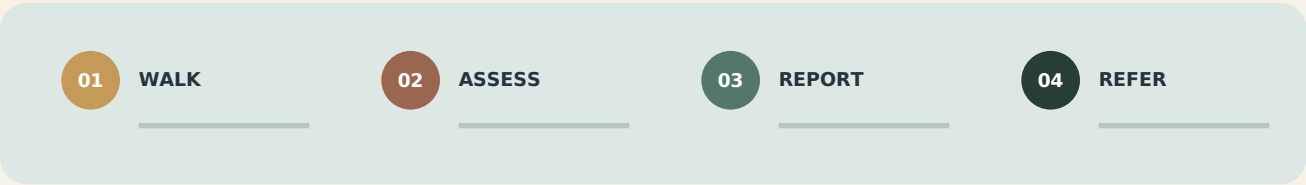
Days 61-90. Two conversations with commercial insurance agents. First paid assessment.

The metric: paid assessments delivered per month. For the resiliency side, repeat bookings from the same employer — a one-off workshop that never repeats is a sign the content did not land.



LEADERSHIP SESSION | Keep resiliency training educational, outcome-specific, and separate from diagnosis or treatment.

7. Honest assessment



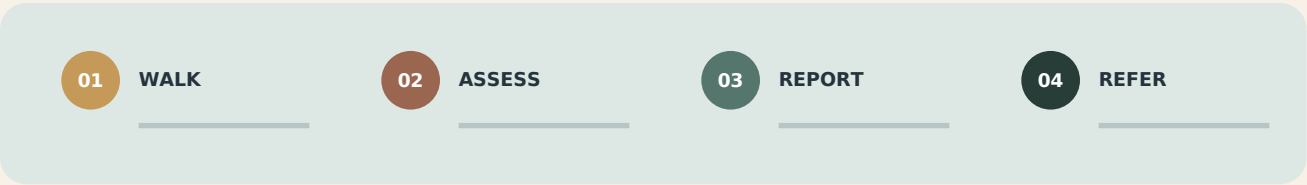
Split the verdict, because the two halves are not the same business.

Resiliency, either state: do not enter, and I would say that plainly to him. Free R2 Performance Centers cover the military audience with credentialed professionals at 32 installations. On the civilian side the incumbents hold the market with proprietary assessment instruments and university names, and a workshop without one of those is a commodity sold against firms with decades of research behind them. There is no revenue here to take — the military half is given away by the Army and the civilian half is defended by an instrument you cannot replicate.

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CORE REFERENCE

Advisory Startup Cost Reference

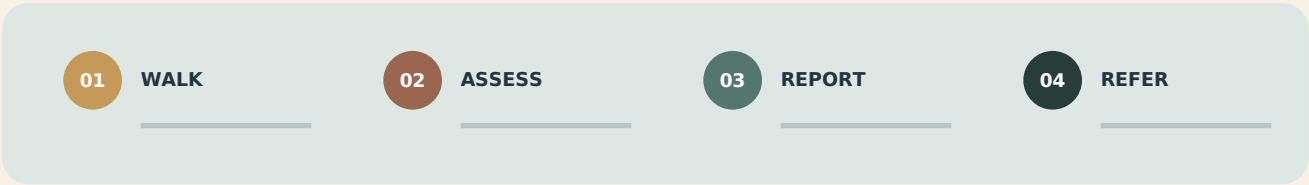


Use the source figures as the planning baseline. Replace local, personal, already-owned, and time-sensitive assumptions with actual quotes and requirements before launch.

Item	Cost
Professional liability (E&O)	\$500-2,000/year
General liability	About \$32/month
Report templates, camera, measuring tools	Under \$300
Realistic startup, advisory only	\$600-1,500

CORE REFERENCE

Source Pricing Reference



Use the source figures as the planning baseline. Replace local, personal, already-owned, and time-sensitive assumptions with actual quotes and requirements before launch.

Tier	Price	What it is
Low	\$350-600	Two-hour walkthrough plus written report
Mid — recommended	\$1,500-3,500	Full assessment, report, and a follow-up review after changes are made
Premium	\$1,000-2,500/month	Retainer covering periodic reassessment and staff briefings
Resiliency session	\$1,500-3,000	One delivered 90-minute session
Resiliency programme	\$3,000-7,000	A developed 60-minute course, materials included

WORKSHEET 01

Startup Checklist

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DONE	ACTION	OWNER DATE NOTES
☐	Define the exact self-protection and resiliency customer, problem, deliverable, service area or channel, and buying trigger.	
☐	Run the source's smallest low-cost demand test before buying major equipment or committing to long-term overhead.	
☐	Write the offer, inclusions, exclusions, timing, acceptance standard, and customer responsibilities.	
☐	Check licensing, zoning, and tax rules for your own city and state before starting.	
☐	Confirm federal, state, local, tax, advertising, privacy, accessibility, contract, and record requirements [VERIFY].	
☐	Obtain general liability, professional liability, property, auto, workers' compensation, cyber, and client-required coverage as applicable [VERIFY].	
☐	Create intake, estimate, scope, approval, delivery, quality-control, incident, invoice, and closeout records.	
☐	Price from actual labor, materials, equipment, travel, payment fees, taxes, rework, overhead, and reserve.	
☐	Complete one paid pilot and document the result only with written customer permission.	
☐	Track the source's one metric, plus gross margin, delivery time, exceptions, referrals, and repeat work.	

WORKSHEET 02

Equipment and Budget Worksheet

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PRIORITY REPORT | Organize findings into costs nothing, costs a little, and costs real money, with owner and follow-up date.

ITEM	NEEDED	ESTIMATE	ACTUAL	NOTES
Formation, registrations, licensing, tax setup, contracts, and professional review [VERIFY]				
General liability, professional liability, property, auto, workers' compensation, cyber, and required coverage [VERIFY]				
Core equipment, tools, supplies, safety gear, storage, maintenance, replacement, and backups				
Computer, phone, software, scheduling, payment, e-signature, records, security, and backup				
Website, business email, phone, listings, signage, accessibility, privacy, and marketing [VERIFY]				
Original intake, estimate, scope, checklist, quality, incident, invoice, and closeout templates				
Training, credentials, continuing education, renewal, testing, and professional memberships [VERIFY]				
Vehicle, delivery, travel, fuel, mileage, parking, tolls, rental, and route costs as applicable				
Bookkeeping, merchant fees, taxes, legal review, data protection, and records [VERIFY]				
Contractor, employee, payroll, supervision, quality control, and administrative support [VERIFY]				
Working capital, refunds, rework, claims, chargebacks, downtime, deductibles, and reserve				

BUDGET CONTROL

TOTAL ESTIMATE: _____ TOTAL ACTUAL: _____ CASH RESERVE: _____

WORKSHEET 03

Pricing and Estimate Template



CLIENT	SERVICE LOCATION	ESTIMATE NUMBER	DATE

SERVICE OR INPUT	BASIS	AMOUNT
Discovery or intake	Customer and scope	
Core service or product	Quantity and basis	
Materials or direct costs	Actual or allowance	
Labor or professional time	Hours or fixed scope	
Equipment, delivery, or travel	Written basis	
Documentation and quality control	Included or added	
Approved option or add-on	Written basis	
Rush, after-hours, or change [VERIFY]	Written basis	
Tax or required fee [VERIFY]	Confirmed basis	
Total estimate		

TOTAL ESTIMATE	DEPOSIT OR AUTHORIZATION	VALID THROUGH

WORKSHEET 04

Assessment and Training Agreement

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FIELD	AGREED DETAIL
Customer, legal entity, contacts, billing, service or delivery location, dates, and decision-maker	
Customer need, current condition, objective, constraints, success standard, and source documents	
Selected offer, quantities, deliverables, inclusions, exclusions, options, and completion standard	
Schedule, access, dependencies, customer preparation, approvals, delays, and communication	
Materials, equipment, substitutions, delivery, storage, utilities, security, and site conditions [VERIFY]	
Inspection, testing, checklist, documentation, acceptance, correction, and handoff	
Change orders, added work, hidden conditions, cancellation, rescheduling, and out-of-scope requests	
Fee, deposit, expenses, tax, invoicing, payment, late payment, refunds, and chargebacks [VERIFY]	
Licensing, permits, insurance, safety, privacy, accessibility, and customer-required controls [VERIFY]	
Warranty, maintenance, service response, damage, loss, limitation, and claim procedure [VERIFY]	
Confidentiality, records, photos, data, testimonials, portfolio use, retention, and deletion [VERIFY]	
Completion, acceptance, closeout, support period, complaint, dispute, termination, and signatures [VERIFY]	

WORKSHEET 05

Invoice Template

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BUSINESS	CLIENT	INVOICE NUMBER	DATE DUE

DESCRIPTION	QUANTITY	RATE	AMOUNT
Discovery or intake			
Core service or product			
Materials or direct cost			
Delivery or travel			
Documentation or quality control			
Approved option			
Approved change			
Tax or required fee [VERIFY]			

SUMMARY	AMOUNT
Subtotal	
Tax [VERIFY]	
Credits / adjustments	
Total	
Balance due	

Assessment and Training Lead Tracker

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DATE	LEAD SOURCE	NEED OR SCOPE	QUOTE	STATUS NEXT STEP

DATE	CLIENT	OFFER	PAID	FOLLOW-UP	REBOOKED

ONE METRIC

PAID ASSESSMENTS: FOLLOW-UPS: REPEAT BOOKINGS:

WORKSHEET 07

Self-Protection and Resiliency Compliance Page

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

CHECK	CONTROL	INITIALS NOTES
☐	Licensing, zoning, tax, advertising, privacy, accessibility, safety, environmental, and local rules are confirmed [VERIFY].	
☐	Required insurance, certificates, limits, exclusions, additional insureds, drivers, workers, and subcontractors are confirmed [VERIFY].	
☐	Written scope defines the offer, exclusions, responsibilities, schedule, acceptance, payment, warranty, and change control.	
☐	Equipment, tools, vehicles, products, software, storage, access, and backups are inspected and fit for the actual work [VERIFY].	
☐	Training, credentials, permits, inspections, records, recurring renewals, and customer requirements are current [VERIFY].	
☐	Customer, payment, property, employee, health, identity, and confidential data are minimized and protected [VERIFY].	
☐	Pricing, credentials, affiliations, testimonials, savings, results, and outcome claims are truthful and documented.	
☐	Incident, damage, spill, injury, complaint, refund, breach, interruption, and escalation procedures are written [VERIFY].	
☐	Work stops for unsafe conditions, missing authorization, inadequate coverage, prohibited scope, deception, or requirements outside competency.	

STOP RULE

Do not begin until licensing, advisory scope, insurance, site authorization, access, records, privacy, conflicts, credentials, emergency limits, and the boundary from guarding, investigation, therapy, diagnosis, treatment, or other regulated work are confirmed [VERIFY].