# LoftyBiz Setup Package Worksheet

Name the work you do at the start, list what it delivers, tie it to the first result the client wants, and sketch a paid plan they can keep.

*Companion download for LoftyBiz 132 — Get Paid for Setup: Named Setup Fees and Paid Planning Sessions.*

*Example figures. General education, not financial, legal or tax advice. Results vary. These are examples, not promises. Prices and client figures in the video are rough examples, not quotes or forecasts.*
*You can write your onboarding checklist and package notes as SOPs in one place in Systex, our own product. You can find Systex at loftybiz.net, or click the link in the description.*

## 1. List everything you do before the routine work begins

This week, list everything you do for a new client before the routine work begins. Give that work a name. A fee with no stated value just looks like a penalty for signing up. In the bookkeeping example, the package was called the Quick Start.

| Setup task you currently do (often unpaid) | Hours it usually takes | Keep in the named package? |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Working name for this package: _____

## 2. List exactly what the package includes

On one page, list exactly what the package includes. In the Quick Start example: bank and card accounts connected; the last three months of records cleaned and sorted; payroll checked and set up; a one-hour walkthrough where the owner sees their first clean report. The example price was seven hundred and fifty dollars, based on the value of being up and running quickly, not just on the hours. Your figures will be different.

| What the package includes (write your list) | Delivered by (day) |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

## 3. Tie it to the first result the client wants

Map the package to the first thing clients actually care about. In the bookkeeping example, that was a clean monthly report they can trust, delivered in the first month, not the third. So the Quick Start ended with that report on the table.

| First result the client wants | How this package delivers it |
|---|---|
| | |
| | |

## 4. Set a price and a reason to decide

Set a price and a deadline for a discount. In the example, clients who signed before the end of the month got half off the Quick Start. That kept the price honest while rewarding a fast yes. Common mistakes: calling it a fee without saying what it includes; pricing it only on hours; and making it so large that it blocks the monthly service it is meant to start. In the example, records older than three months were quoted separately.

| Pricing note | Your figure |
|---|---|
| Named package price (based on the value of a fast start, not only hours) | |
| Deadline for a decision / discount | |
| What is quoted separately (for example, records older than three months) | |

## 5. Track two numbers

The attach rate: how many new clients bought the package. And time to first value: how many days until the client saw the first result. In this example, over the next two quarters, most new clients chose the package, and the average time to the first clean report dropped from about seven weeks to under three. Your figures will be different.

| Number to track | How you will count it | This period |
|---|---|---|
| Attach rate: new clients who bought the named package | | |
| Time to first value (days until the first result) | | |

## 6. Sketch a paid planning session

If you give away planning in free calls, sketch what a paid version would hand the client. In the landscape example, the Garden Plan cost four hundred and fifty dollars and included a site visit, a scaled drawing, a planting list, a phased budget in three stages, and a clear order of work. The plan belonged to the client; they could build it with anyone. If the client booked the build within sixty days, the four hundred and fifty dollars was credited against the first stage. A paid plan has to be worth paying for. If the session is just a sales pitch with a price on it, people will feel it.

| Paid-plan element | What the client takes away |
|---|---|
| Name of the session | |
| Price, and any credit toward later work | |
| What is included (visit, drawing, list, budget, order of work…) | |
| The next step after the plan | |
| Extra requests that will be priced separately | |

## 7. Put the routine in Systex

A setup package only works if every new client gets the same steps. Put that one-page package and the paid-plan sketch into Systex, so the routine is waiting for the team. In Systex, the assistant answers your team's questions from your own knowledge base. Systex is our own product. You can find Systex at loftybiz.net.

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