

CONSULTANCY DONE DIFFERENTLY

7 Tools — Input Resources

Everything you need to gather before Day 1

consultancydd.com/7/

This checklist covers every input needed to run all 7 CDD AI-powered business tools. Gather these before your first training session. You don't need everything perfect — you need enough to start. Rough notes, old project lists, and approximate figures all work. The tools will help you refine everything as you go.

00 QUICK REFERENCE — ALL 7 TOOLS AT A GLANCE

Tool	Name	Key Inputs Required	Est. Time to Gather
1	Business DNA Builder	ABN, business details, team list, equipment, past projects (up to 5), client references (2), LinkedIn URL	45 – 75 min
2	Prompt Assembler	Tool 1 output (auto-populated), AI tool access (Claude / ChatGPT / Gemini)	5 min
3	Audience Definition	Tool 1 output, current client types, target project types, revenue range	15 – 20 min
4	PVP Builder	Tool 1 output, LinkedIn URL, career history, professional photo	20 – 30 min
5	Blueprint Builder	Tools 1+3 outputs, existing logo/colours, key competitor names	20 – 30 min
6	Chaining Workflows	All prior outputs, target grant/tender URLs, financial summary, Windows PC	45 – 60 min
7	Application System	All 13 PDFs from tools 1–6, grant/tender doc, insurance certs, financials	60 – 90 min

01–07 DETAILED INPUT CHECKLIST BY TOOL

How to use this checklist

Work through each tool section below. Tick off what you already have. For anything missing, make a note of where to find it. You don't need 100% of these before you start — aim for 80% on Tools 1–3. Tools 6 and 7 inputs can be gathered during the training.

1

TOOL

Business DNA Builder

Foundation Tool — run this first

consultancydd.com/tools/business-dna/

- Business name (registered trading name)
- ABN and ACN
- Business structure
Sole trader, partnership, Pty Ltd, etc.
- Business address and contact details
Phone, email, website (if any)
- Year the business was established
- **Owner / principal full name and background**
Trade background, years in industry, qualifications held
- Number of full-time, part-time, and casual staff
- Key personnel names and roles
Supervisors, operators, admin — anyone who contributes to delivery
- Trade and professional qualifications
Your own and key staff — Certificate III/IV, white cards, licences
- **Equipment register**
Plant, vehicles, machinery — make, model, capacity. Rough list is fine.
- Geographic operating area
Postcode range, LGA, or region you currently work in
- Services offered
Full list of what you do — earthmoving, drainage, civil works, fabrication, etc.
- Annual revenue range
Approximate is fine — \$500K, \$1M, \$2M, \$5M+
- Existing certifications
ISO 9001, WHS, environmental, prequalification panels already on
- LinkedIn profile URL
Your personal LinkedIn — even if incomplete
- Business website URL
If you have one

- Existing logo and brand colours
Logo file (any format) and hex/RGB codes if known

SECTION F — PAST PERFORMANCE

Tell us about the work you've delivered — and who can vouch for it.

Your Projects (up to 5 — minimum 3 required)

List your three most relevant completed projects. These feed directly into your Capability Statement, Capacity Statement, Value Proposition, and Tool 7 Application System. Add up to 5 if you have them — the more context, the stronger every downstream document.

For each project, gather:

- Project name
e.g. Mount Louisa Road Maintenance Contract
- Client / Principal
e.g. Townsville City Council
- Contract value
Actual dollar figure — e.g. \$280,000. Approximate is fine.
- Year completed
2018–2026 range, or "In progress"
- Project type
Road Maintenance / Bulk Earthworks / Drainage & Stormwater / Subdivision Earthworks / Site Clearing & Prep / Bridge & Structure / Other
- Scope summary
1–2 sentences: what work was performed — e.g. "Re-sheet 4.2km unsealed road, drainage reconstruction, compaction to 98% MDD."
- Key outcome
Completed on time / Early / Under budget / Zero safety incidents / Client repeat engagement
- Evidence available
Completion certificate / Client reference letter / Site photos / As-built drawings / Client sign-off email / None yet

■ Repeat for each project. Minimum 3 projects. The Business DNA Builder shows 3 project cards by default — click "+ Add another project" to reveal Project 4 and Project 5.

Your Client References (2 required — 3 recommended)

★ Privacy Note — Your references stay private

Reference contact details are saved in your Business DNA but are NOT sent to ChatGPT, Claude, or any AI tool. They are used to auto-fill your Capability Statement and prequalification forms only.

For each reference, gather:

- Reference name
e.g. Greg Hollis

■

Organisation
e.g. Townsville City Council

■

Role / Title
e.g. Project Manager

■

Phone
e.g. 07 4727 9800 — at least one of phone or email required

■

Email
e.g. name@organisation.com.au — at least one of phone or email required

■

Which project they know you from
Select from the projects listed above, or enter manually

■ 2 references required. Add a third via "+ Add a third reference" in the tool. Reference details are stored in your Business DNA but are NEVER sent to Claude, ChatGPT, or Gemini — they feed into your Capability Statement template and Tool 7 prequalification forms only.

WHY SECTION F MATTERS	
Capability Statement	Project Experience section arrives populated — no blank placeholders
Value Proposition	AI uses real \$-values and outcomes: "delivered \$620K subdivision 1 week early"
Capacity Statement	Past project delivery used as proof of peak capacity and programme management
Tool 7 Application System	Prequalification drafts require minimum 3 projects + 2 references collected here
Business DNA Context Block	All downstream AI output quality improves with specific project data in context

2
TOOL

Prompt Assembler

AI Engine — auto-populated from Tool 1

consultancydd.com/tools/prompt-assembler/

- Completed Business DNA output from Tool 1
[Copy and paste the full context block generated by Tool 1](#)
- Access to at least one AI tool
[Claude \(claude.ai\)](#), [ChatGPT \(chat.openai.com\)](#), or [Gemini \(gemini.google.com\)](#) — free accounts work
- Claude Pro, ChatGPT Plus, or Gemini Advanced (recommended)
Free tier works but paid tier gives better output quality and longer context window

3
TOOL

Audience Definition Tool

Market Intelligence — who you want to work for

consultancydd.com/tools/audience-definition/

- Business DNA output from Tool 1
- List of your current clients
[Business names, types \(council, developer, Tier 1 contractor, etc.\), and what work you do for them](#)
- List of clients you want to work for
[Names of companies or types of organisations you're targeting](#)
- Industries you serve or want to serve
[Local government, resources, residential development, infrastructure, etc.](#)
- Target project size range
[Minimum and maximum contract value you can comfortably deliver](#)
- Geographic target area for growth
[Where you want to win work — NQ region, specific LGAs, or corridor \(e.g., Haughton Pipeline route\)](#)
- Names of 2–3 competitors in your space
[Businesses doing similar work in your area — for benchmarking only](#)

4
TOOL**PVP Builder**

Personal Brand — your LinkedIn and personal value

consultancydd.com/tools/pvp/

- Business DNA output from Tool 1

- Your LinkedIn profile URL

linkedin.com/in/yourname — create a free account if you don't have one

- Your career history

Roles held, companies worked for, years — going back 10–15 years is plenty

- Key projects you've delivered personally

Not just the company — what did you specifically lead or manage?

- Personal achievements and milestones

Awards, certifications, safety records, major contracts won, business growth figures

- What makes you different from other operators

Your honest answer — niche skills, specific equipment, regional knowledge, etc.

- A professional photo

Clear, recent, business-appropriate — phone camera is fine

- Recommendations or references you could request

Names of clients, project managers, or colleagues who could write a LinkedIn recommendation

5
TOOL**Blueprint Builder**

Brand and Strategy — Customer Persona, VP, and Brand Identity

consultancydd.com/tools/blueprint/

- Business DNA output from Tool 1

- Audience Definition output from Tool 3

- Your existing logo file

Any format — JPG, PNG, PDF, AI. If none, note your preferred colours.

- Brand colours (if established)

Hex codes, Pantone references, or “we use dark blue and orange” — any level of detail

- Any existing marketing materials

Brochures, capability statements, quote templates — even old ones

- Your preferred business tone

How do you like to come across? Professional and formal? Straight-talking and plain? Friendly?

- 2–3 sentences about why clients choose you
Your own words — what do clients say when they refer you?
- Names of 2–3 competitor businesses
So the tool can identify your differentiated positioning
- Your Google Business Profile URL
If you have one — google.com/maps search for your business name

6
TOOL

Chaining Workflows

AI Workflow Engine — cloud and local AI workflows

consultancydd.com/tools/chaining-workflows/

- All outputs from Tools 1–5
The more complete your prior tool outputs, the better the workflow results
- Target grant name or URL
The specific grant you are researching or applying for — e.g., Building Better Regions Fund, NQ LGIP
- Target tender name or URL
Head contractor prequalification panel or specific project tender
- Financial summary — last 12 months
Approximate revenue, major cost categories, staff costs — for local Qwen only, not shared with cloud AI
- Names of 2–3 direct competitors
For the competitive intelligence workflows — local Qwen only
- Existing WHS documents
Any existing WHS plan, SWMS, safety checklists — even partial or outdated versions
- Existing policy documents
Quality policy, environmental policy, any ISO-related documents
- Windows PC or laptop
For local Qwen setup — minimum 8GB RAM, 16GB recommended. Mac users use cloud workflows only.
- LM Studio installed (for Qwen local workflows)
Download from lmstudio.ai — free. Guide provided in Tool 6 resources.
- GPT4All (fallback for Qwen)
Download from nomic.ai/gpt4all — free. Use if LM Studio won't run on your machine.

7
TOOL

Application System

The Payoff — grant and tender application first drafts

consultancydd.com/tools/application/

- All outputs from Tools 1–6 (the full document library)
Customer Persona PDF, Value Proposition PDF, Brand Identity PDF, LinkedIn profile, audience definition, workflows output
- The specific grant or tender document
Full PDF or URL — the actual application form and guidelines you are responding to
- Public liability insurance certificate
Current certificate of currency — minimum \$10M for most Tier 1 panels
- Professional indemnity insurance certificate
If applicable to your trade
- Workers compensation insurance certificate
Current Queensland workers comp certificate
- Plant and equipment insurance certificates
For major plant items if required by the application
- Financial statements or BAS summary
Last 12 months — profit and loss, or at minimum last 4 BAS lodgements. Local Qwen only — stays on your device.
- Evidence of past project delivery
Completion certificates, client reference letters, project photos, as-built drawings
- Subcontractor or supply chain evidence
If the application asks about your supply chain capacity
- Safety record summary
Lost time injury rate, incident reports, WHS audit results if available
- Key personnel CVs or capability summaries
For named personnel listed in the application
- Prequalification questionnaire
If applying for a supplier panel — the specific form provided by the head contractor

Privacy and data security

Sensitive financial data, competitor intelligence, and strategic documents should ONLY be used in the local Qwen workflows (Tool 6 and Tool 7). These run entirely on your own device — no data is sent to any cloud service. Cloud AI tools (Claude, ChatGPT, Gemini) should only receive business DNA context, project descriptions, and publicly available information. The CDD Qwen Setup Guide (Tool 6 resources) explains how to install and use local AI.

NEXT **READY TO START?**

Step 1	Gather your Tool 1 inputs: business details, team, equipment, and past projects (Section F). 45–75 minutes.
Step 2	Go to consultancydd.com/tools/business-dna/ and run the Business DNA Builder. Complete all sections A–F including at least 3 projects and 2 references.
Step 3	Save your Business DNA output. You'll paste it into every tool that follows. References are stored separately.
Step 4	Return to consultancydd.com/7/ to access all 7 tools in sequence.
Step 5	Book a discovery call if you want CDD guidance on which tools to prioritise.

Book a Discovery Call

30 minutes with Raymond Ward. We'll map exactly where you are and which tools to start with.

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