

FROM SKILLS TO SCALE

BUSINESS PREPARATION PACK

Prepare the business facts, people and evidence needed to build stronger documents in one practical day.

Minimum attendance requirement

Bring enough business knowledge - and the right owner, manager or selected staff - to complete the Business DNA with confidence. Completing it in advance is preferred, but not mandatory.

Who this pack is for

One pack is used per business. It may be shared freely with the owner, managers and selected staff who can contribute accurate information about operations, projects, customers, WHS, finance, plant, people and growth goals.

What to do before the event

- ☐ Choose the owner or manager who will lead the Business DNA process.
- ☐ Identify selected staff who can answer difficult operational, project, customer, WHS or capability questions.
- ☐ Collect the documents and project facts listed in this pack.
- ☐ Confirm at least one working laptop per business, plus one laptop for every person completing a private PVP.
- ☐ Test access to a cloud AI chat window and your document editor.
- ☐ Complete the Business DNA in advance where practical, or bring enough information to complete it at the event.

Business *[Insert business name]*

Date *[Insert date]*

Venue *[Insert venue]*

1. Two preparation paths

Choose the path that best suits your business. Both are acceptable.

Path A - Complete the Business DNA before the event

Allow about 30-45 minutes for a well-documented small business. Completing the form early saves workshop time and lets your team solve hard questions in advance. The Your Business tab should be filled in as completely and accurately as possible.

Business DNA Builder: <https://consultancydd.com/tools/business-dna/>

Paper / fillable Intake Form: https://consultancydd.com/tools/business-dna/CDD_BusinessDNA_Intake_Form.pdf

Path B - Bring the information and complete it at the event

You do not need to finish the Business DNA in advance. You must bring the business information and people needed to complete it confidently. A paper copy is useful for handwritten notes and new insights during discussion.

Browser storage warning

Business DNA answers save in the browser. Use the same computer, browser and browser profile. Avoid private/incognito mode. Clearing browser storage, changing browsers or changing computers may remove saved values.

Save the DNA files

After generating the Business DNA outputs, save the Business DNA block and every downloaded DNA document as text files on your computer. Do not rely only on browser storage.

What happens at the event

- ☐ CDD confirms that the Business DNA is sufficiently complete to proceed.
- ☐ The Business DNA block and text files are saved locally.
- ☐ The Prompt Assembler and later tools reuse the DNA, Customer Persona, Value Proposition and Brand Identity.
- ☐ Documents are created, saved and checked for missing sections or obvious empty input areas.
- ☐ Formal business, legal, financial, WHS and technical QA occurs after creation by the relevant people.

2. Business details and services

Prepare the facts needed for the Your Business and What You Do sections.

Business name

Owner / contact

ABN

Website

Years operating

Business structure

Primary location

Service area

Primary sector

Secondary sector

Top three services

Other services worth documenting

Ownership and market classifications

☐ Indigenous-owned

☐ Supply Nation certified

☐ Majority female-owned

☐ Social enterprise

☐ None / not applicable

3. People, resources and current position

Prepare enough detail for capability, capacity and WHS documentation.

Direct employees

Regular subcontractors

Normal project size

Largest completed project

Annual revenue band

Maximum operating area

Team roles

Plant and equipment

Licences, certifications and tickets

Prequalification portals and registries

Current WHS and compliance position

☐ A - Nothing formal

☐ B - Some basics

☐ C - Mostly covered

☐ D - Fully documented

Existing compliance documents

4. Customers, goals and attendees

Know the customer segment names and bring people who can answer the hard questions.

Current customer segments

Customer segment(s) you want to grow

Who you want to work for in the next three years

Three-year business goal

Biggest challenge right now

People attending or contributing

Person 1 - name / role / knowledge / DNA or PVP participation

Person 2 - name / role / knowledge / DNA or PVP participation

Person 3 - name / role / knowledge / DNA or PVP participation

Person 4 - name / role / knowledge / DNA or PVP participation

5.1 Project example 1

Prepare three completed or current projects. Accurate evidence improves later documents.

Project name

Client

Location

Year

Contract value

Team size

Duration

Scope

Plant used

Challenges

Measurable results

Evidence reminder: keep supporting evidence available on request. Do not upload contracts, personal data, bank details or other sensitive material into a public cloud AI service.

5.2 Project example 2

Prepare three completed or current projects. Accurate evidence improves later documents.

Project name

Client

Location

Year

Contract value

Team size

Duration

Scope

Plant used

Challenges

Measurable results

Evidence reminder: keep supporting evidence available on request. Do not upload contracts, personal data, bank details or other sensitive material into a public cloud AI service.

5.3 Project example 3

Prepare three completed or current projects. Accurate evidence improves later documents.

Project name

Client

Location

Year

Contract value

Team size

Duration

Scope

Plant used

Challenges

Measurable results

Evidence reminder: keep supporting evidence available on request. Do not upload contracts, personal data, bank details or other sensitive material into a public cloud AI service.

6. Documents and evidence to bring

Bring what already exists. The workshop builds from evidence rather than inventing claims.

Useful documents

- | | |
|--|--|
| ☐ Policies and procedures | ☐ Project summaries |
| ☐ Licences | ☐ Certifications |
| ☐ Tickets | ☐ Insurance policies |
| ☐ Training records | ☐ Existing capability or capacity statements |
| ☐ Existing tender or grant material | ☐ Current website, LinkedIn and Google Business Profile information |

Do not upload sensitive information to cloud AI

Do not paste bank details, passwords, confidential contracts, personal employee information, medical information or protected client data into a public cloud AI service. Later application work involving sensitive data may use a separate local Qwen-based workflow agreed with CDD.

Copies available on request

- | | |
|---|--|
| ☐ Licence copies | ☐ Certificate copies |
| ☐ Ticket copies | ☐ Certificates of currency |
| ☐ Training records | ☐ Project completion evidence |

Existing LinkedIn profile

Advanced PVP users may save their existing LinkedIn profile as a PDF and use it as an input when improving profile copy. The profile remains personal and controlled by the individual.

7. Technology, folders and filenames

Set up the computer before the event so workshop time is spent building documents.

Technology checklist

- | | |
|---|--|
| ☐ At least one laptop and charger per business | ☐ A separate laptop for every person completing a private PVP |
| ☐ A current web browser | ☐ Successful login to a cloud AI chat window |
| ☐ Word, Google Docs or LibreOffice available | ☐ Email access |
| ☐ Download folder located | ☐ Ability to save .txt and .docx files |
| ☐ Smartphone hotspot available as backup | |

Supported cloud AI platforms

All supported cloud AI platforms can run the prompts. Preferred order for reasoning and document quality: Claude, ChatGPT, Gemini, Copilot.

Microsoft Copilot: <https://copilot.microsoft.com/>

Create these folders

- | | |
|---|--|
| ☐ 01 Business DNA | ☐ 02 Prompt Assembler |
| ☐ 03 Audience Definition | ☐ 04 Personal Value Proposition |
| ☐ 05 Blueprint Builder | ☐ 06 Deep Research |
| ☐ 07 Final Documents | ☐ 08 Evidence and Certificates |

Suggested filename

BusinessName_DocumentName_YYYY-MM-DD_v01.docx

Document register

Document 1 - name / created / saved / checked / expert review

Document 2 - name / created / saved / checked / expert review

Document 3 - name / created / saved / checked / expert review

Document 4 - name / created / saved / checked / expert review

Document 5 - name / created / saved / checked / expert review

8. PVP, audience and optional research

Prepare names and access requirements. Detailed AI work happens during or after the event.

Private by default

Each PVP user should use their own laptop. PVP data and results remain private on that individual device. The individual chooses what to share.

PVP user name and current role

Role names, certifications, tickets and years of experience

Training, task experience, machine experience and transferable skills

The PVP can produce 30 possibilities. After a short CDD discussion, the individual selects one or more feasible pathways for the Business Growth Roadmap. The Growth Path text can be changed and the roadmap rerun.

Customer segment names

Separate only where message or offer differs

Business Model Canvas

At a high level, consider customers, value, channels, relationships, revenue, resources, activities, partners and costs. AI performs the detailed drafting. Keep the canvas and Business DNA updated as the business changes. Advanced optional reading: The Business Model Navigator.

Deep Research

Deep Research prompts for Tenders, Grants and WHS are large. A paid ChatGPT Pro or Gemini Pro account is required. If access is unavailable, save each assembled prompt as a text file and run it later on another suitable computer or with someone who has access.

Prompt Assembler: <https://consultancydd.com/tools/prompt-assembler/>

☐ Save Tender Deep Research prompt as .txt if not run

☐ Save Grant Deep Research prompt as .txt if not run

☐ Save WHS Deep Research prompt as .txt if not run

9. Ready for the workshop?

Use this informal final check before leaving for the event.

- ☐ The owner or manager leading the process is attending.
- ☐ Enough people or information are available to complete the Business DNA confidently.
- ☐ The Business DNA has been completed in advance, or the required facts are ready.
- ☐ Three project examples are prepared.
- ☐ Policies, licences, certifications, tickets, insurance details and training records are available.
- ☐ At least one laptop and charger are ready for the business.
- ☐ Every person completing a PVP has their own laptop.
- ☐ Cloud AI login works and opens to the chat window.
- ☐ Word, Google Docs or LibreOffice is available.
- ☐ The recommended folder structure has been created.
- ☐ The participant understands browser-storage limits and will save DNA text files.
- ☐ No sensitive data will be uploaded to a public cloud AI service.
- ☐ Customer segment names are known.
- ☐ The participant understands that workshop completion checks are not a formal audit.
- ☐ Relevant people will complete business, legal, financial, WHS and technical QA after document creation.

What CDD confirms during the workshop

The Business DNA is filled in sufficiently to proceed, DNA text files are saved, and the planned documents are created. A post-event audit is available on request, separately quoted, with scope agreed after CDD reviews the document set.

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Business DNA Intake Form: https://consultancydd.com/tools/business-dna/CDD_BusinessDNA_Intake_Form.pdf

Prompt Assembler: <https://consultancydd.com/tools/prompt-assembler/>

Microsoft Copilot: <https://copilot.microsoft.com/>

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