

Business in a Box to Launch and Scale the Digital Services Firm: To operationalize the "Micro-Firm" model—scaling impact without scaling headcount.

The Concept: In the legacy consulting model, growth required hiring an army of junior analysts. In the Collaborative Intelligence model, you scale by deploying "**Digital Staff.**" This checklist guides you through configuring your internal **Agency OS** so you can deliver enterprise-grade strategy with a lean, agile team.

PHASE 1: INFRASTRUCTURE SETUP (The Foundation)

Before you sell, you must build your own Clean Room.

- **Provision the Workspace:** Set up your instance of the **AI Commons**.
- **Establish the Clean Room:** Configure data isolation protocols to protect client IP.
- **Connect Knowledge Bases:** Upload your core methodology documents (Methodology.pdf, Pricing.pdf) into the secure RAG layer.

PHASE 2: STAFFING THE DIGITAL TEAM (The Leverage)

Configure your Co-Pilots with your specific firm's voice. This transforms generic models into specialized employees.

- **The Business Development (BD) Co-Pilot:**
 - *Input:* Upload your Case Studies and Ideal Customer Profile (ICP).
 - *Capability:* It automates lead qualification and drafts SOWs while you sleep.
- **The Strategic Consultant Agent (SCA):**
 - *Input:* Upload your specific Workshop Frameworks.
 - *Capability:* It generates custom diagnostic scripts in seconds during client meetings.
- **The Solutions Architect Agent (SAA):**
 - *Input:* Upload your Technical Standards and Privacy Policy.
 - *Capability:* It automates the writing of Agent Charters and .yaml configurations, ensuring technical governance.
- **The Client Success (CSC) Co-Pilot:**
 - *Input:* Upload your QVR Templates and ROI Calculators.
 - *Capability:* It tracks client metrics to automate the renewal conversation

PHASE 3: GO-TO-MARKET ASSETS (The Pitch)

- **Define the "Magic Trick":** Create your script for the Real-Time Demo (e.g., "Map a process in 30 seconds"). This proves you have the "Ferrari Engine."
- **Prepare the Asset-Based SOW:** Replace "Hourly Billing" contracts with "Fixed-Fee Deliverable" contracts. Stop selling time. Start selling the system.