



BCS Consultancy Specialist Group | Hybrid Event | March 2026

The Boutique Consultancy Blueprint

What You Need to Know

London | Hybrid | 18:30 – 20:00

Project setup · Business mindset · HR & IR35 · Contracts · Accounts · Getting clients

Facilitated by Purnima Gore | Founder, Project GPS

Meet the Speakers



Run It Like a Project
& Getting Clients

Purnima Gore

Founder

Project GPS

[linkedin.com/in/purnimagore](https://www.linkedin.com/in/purnimagore)



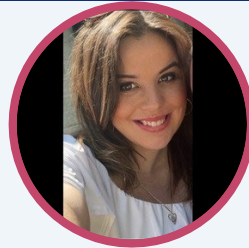
Think Like a Business

Stephen Reeve

Founder

Entrepreneurial Business School

[linkedin.com/in/stephen-reeve](https://www.linkedin.com/in/stephen-reeve)



HR & IR35

Jessica Gill

Founder

Next Stride HR

[linkedin.com/in/jessica-gill-569b2684](https://www.linkedin.com/in/jessica-gill-569b2684)



Contracts & Risk

Irene Dallas

Principal

Dallas and Co Solicitors

[linkedin.com/in/irene-dallas-94892a9a](https://www.linkedin.com/in/irene-dallas-94892a9a)



Accounts & Finance

Liz Noble

Founder

Providence Financial

[linkedin.com/in/liz-noble](https://www.linkedin.com/in/liz-noble)



Slides and speaker LinkedIn profiles will be shared after the event

Important Notice



This session is for general information and discussion purposes only.

Nothing presented today constitutes formal legal, HR, financial, accounting or tax advice. Speakers share experience and general guidance from their respective areas of expertise.

For questions specific to your circumstances — including IR35, contracts, tax, employment status or legal obligations — please seek advice from a qualified professional such as a solicitor or accountant.

Speakers and BCS accept no liability for decisions made based on information shared in this session.

Session Agenda



Workshop Opens

Introductions & housekeeping



Run It Like a Project

Purnima Gore



Think Like a Business

Stephen Reeve



HR & IR35

Jessica Gill



Accounts & Finance

Liz Noble



Contracts & Managing Risk

Irene Dallas



Getting Clients

Purnima Gore



Close & Wrap-Up

Q&A, reflections & next steps



"Are you treating your consultancy setup as a project — or just hoping it falls into place?"

Key Discussion Points

- Start with Business Justification: why are you doing this and what does success look like in 12 months?
- Plan your consultancy like a delivery project — scope, timeline, risks and dependencies all need documenting
- Use stage gates: review before committing resources to the next phase. Do not front-load everything on day one
- Build your project team early: accountant, solicitor, mentor and network — know who to call and when

Start with the Business Case

Define success before you start. Set your minimum rate, 12-month goal and criteria for stopping. Without a business case, you are guessing.

Manage by Stages

Break your setup into phases. Review at each stage gate before committing resources. Adapt as you go — do not build everything on day one.

Plan for Risk

IR35, late payment, dry pipeline — identify what could derail you before it does. A risk log is not optional for any serious project.

Your Checklist

Define what 'done' looks like in 12 months

Identify your top 3 risks before you start

Set your first stage-end review date



"Who do you serve, what problem do you solve, and why should they choose you over anyone else?"

Key Discussion Points

- Your value proposition must be specific and clear — generalities do not win clients or command premium rates
- Know your pricing model: day rate, project fee, retainer — and understand when each one protects your interests
- Apply GROW to map your consultancy goal, current reality, options available and the actions you will commit to
- Build pipeline when you are fully booked — it is your insurance policy for when work slows down

Price for Profit

Know your minimum, market and premium rates. Undercharging is unsustainable. Review rates annually — inflation applies to your expertise too.

Your Value Proposition

Who you help, what you do for them and the result they get. Write it in one clear sentence. No jargon, no vagueness.

Pipeline Never Stops

The best time to fill your pipeline is when you are fully booked. Referrals from satisfied clients beat any cold outreach.

Your Checklist

Write your value proposition in one sentence

Set your rate: floor, market and value

Name your first 3 target clients



"Do you know exactly how IR35 applies to your next engagement — and could your contract prove it?"

Key Discussion Points

- IR35 determines whether you pay PAYE tax at source or retain the tax efficiency of your Ltd Company
- The three tests — Substitution, Control and Mutuality of Obligation — must all point to genuine independent contracting
- Use HMRC's CEST tool before every engagement and keep a record of the determination you receive
- Your contract must accurately reflect your real working arrangements — not just the ideal on paper

The Three IR35 Tests

Substitution, Control and Mutuality of Obligation — all three must support genuine independent contractor status on every engagement.

Ltd Co vs Sole Trader

Ltd Co brings tax efficiency and liability protection but more admin. Sole Trader is simpler but less efficient at scale. Always get advice.

Protect Your Status

Document working independence in writing. Ensure contracts match real practices — inconsistency between contract and reality is what HMRC looks for.

Your Checklist



Run CEST before every new engagement



Check substitution rights are in your contract



Document your working independence in writing



"Could your consultancy survive six months without a new contract — and do you actually know the answer?"

Key Discussion Points

- Inside IR35? Dividends not an option — PAYE only. Know your status before choosing your structure
- Tax efficiency: pension and relevant life/CI cover are legitimate Ltd Co expenses
- Flat Rate VAT: the 2% rule can make it more expensive than standard if input tax is low — model both
- Payments on account — not just 31 Jan. Sole traders: MTD for SA from April 2026

Separate Legal Entity

Ltd Co money is not yours. Mixing funds undermines limited liability.

Tax Efficiency

Pension and life cover reduce your tax bill. Commuting ≠ travel expenses.

Deadlines & Compliance

Payments on account catch many off guard. Set money aside as income arrives.

Your Checklist



Open a dedicated business bank account



Appoint an accountant to advise you and set up your bookkeeping system



Note all key tax and Self Assessment deadlines



"Have you read every contract you have signed — and do you know exactly what you agreed to?"

Key Discussion Points

- Contracts protect both parties — but only if you understand what is in them before you sign anything
- Scope creep starts with vague deliverables: define exactly what you will deliver, by when and in what format
- IP ownership must be explicit — know what you are creating, what you retain and what transfers to the client
- Limitation of liability: always negotiate a cap. Unlimited liability is unacceptable and must be pushed back on

Scope & Deliverables

Define deliverables, timelines and format precisely. Include a change control mechanism. Vague scope is the root cause of all scope creep.

IP Ownership

Who owns the work you create? Pre-existing IP must be explicitly excluded in every contract. Always check this clause before signing.

Liability Cap

Push back on unlimited liability — always. A cap at 1–2x contract value is standard. Without one, a single claim could close your business.

Your Checklist



Read every clause before signing — all of it



Check IP ownership is clearly defined



Negotiate a liability cap on every contract



"Where will your next client come from — and are you building those relationships before you need them?"

Key Discussion Points

- Networking is relationship building — not a quick fix you activate when work dries up
- Post insights on LinkedIn consistently, engage with others and let genuine value find you
- BCS, PMI and sector communities put you in front of people who commission and refer work
- Referrals are your best lead — deliver brilliantly, then ask for an introduction

Strategic Networking

Attend events with purpose. Follow up within 48 hours. Nurture contacts when you are not seeking work — that is when referrals happen.

LinkedIn Visibility

Post your insights, not just your CV. Engage consistently with comments. LinkedIn builds trust over months — start now and stay consistent.

Collaboration & Groups

Join communities where clients learn and gather: BCS, PMI, sector meetups. Contribute genuine value — the relationship comes before the pitch.

Your Checklist



Attend one relevant networking event per month



Post on LinkedIn at least once per week



Join two professional communities in your niche



07 | Your Boutique Consultancy Checklist

01 Run It Like a Project

- Define what 'done' looks like in 12 months
- Identify your top 3 risks before you start
- Set your first stage-end review date

02 Think Like a Business

- Write your value proposition in one sentence
- Set your rate: floor, market and value
- Name your first 3 target clients

03 HR & IR35

- Run CEST before every new engagement
- Check substitution rights in your contract
- Document your working independence

04 Accounts & Finance

- Open a dedicated business bank account
- Appoint an accountant to set up your bookkeeping
- Note all key tax and Self Assessment deadlines

05 Contracts & Risk

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- Check IP ownership is clearly defined
- Negotiate a liability cap on every contract

06 Getting Clients

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