The Security Officer Network's

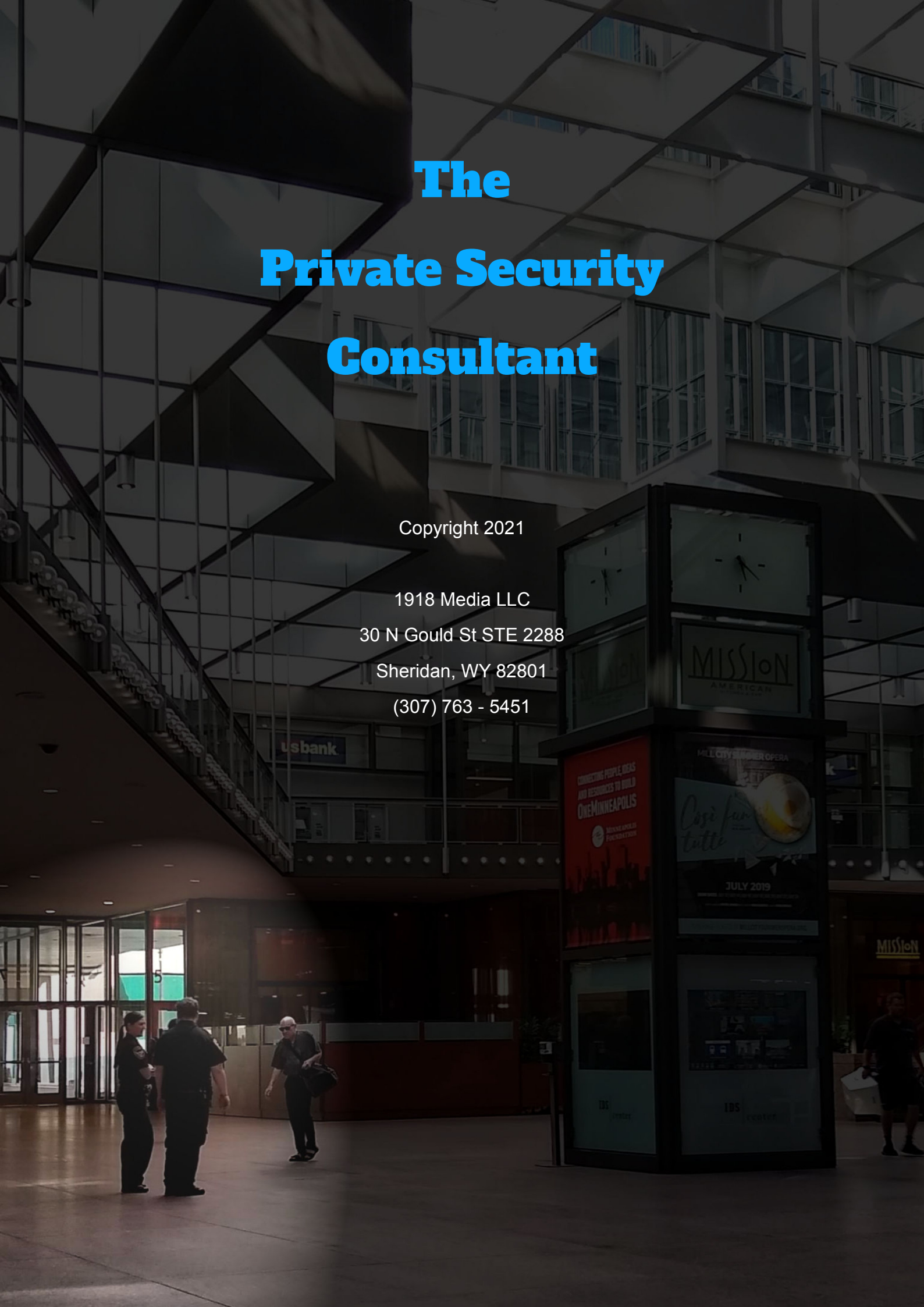# THE PRIVATE SECURITY CONSULTANT

The Private Security Consultant

About This Course

Four Hours

Lesson Link:

Time: Five Hours

Level: Advanced

Points: 150 points

Test: 25 Questions in 30 minutes with a 100% score required.

Features: Available through the The Security Officer Network's Curriculum Delivery System.

Objective: Course takers study the role of consultant in the private security industry. Students analyze the security assessment, the recommendations white paper and the process for assessing and documenting security conditions.

Resources: Participants may download the official The Private Security Consultant and upon completion of the course, a Certificate of Passage.

Prologue

This course makes up a key part of The Security Officer Network's **ongoing** effort to bring new, independent minds into the higher-level private security space.

It's made available to even the newest of Network members: those who have just opened their membership and are at a basic membership level.

This isn't to suggest that all Network members will become security consultants. There are many areas of specialization in the security industry and consulting is just one of the security professional's avenues to success.

So why is this particular niche so important and why are all Network members encouraged to take this course?

Every officer should approach security from the perspective of the security consultant. The science of consulting is at its core the science of thoughtful observation. And, even though the course taker may never become a security consultant, he will forever benefit from seeing the world through the eyes of a consultant. From personal protection officer, to armored car driver, to security manager, true success in this industry depends on the officer's ability to observe. Observation is a mindset and this course teaches the science of observation.

And, having aspirations is a very good thing. As you will see in this course, when an officer aspires to become a security professional, he becomes great at his job—even if that job is that of an unarmed security guard at a low-paying post.

It's hoped that this work will inspire the reader—you—to become better at every aspect of security.

Section 1: The Introduction

Welcome to The Private Security Consultant course from The Security Officer Network.

In today's rapidly changing public safety and security technology environments the role of the private security consultant is set to emerge from that of a small niche to a major player. That's because the private security world seems set to enter an era of status not seen since the days of the old west when modern policing eventually replaced the private detectives that then constituted such an essential part of the American justice system.

Technology is changing everything: from use of force policy to access control and from offensive security and penetration testing to security policy compliance, a world of new opportunities has become available to the security professional.

If anything is changing faster than technology, it's public safety politics. In today's world of social media driven policymaking, public safety policy has become the plaything of vapid politicians who respond in real-time to the latest whims of the most recently trending tweet or social media controversy. This has created a chaotic environment of knee-jerk and ill-thought-out public safety policies that are absolutely wreaking havoc in many jurisdictions.

In this confusing maze of public safety chaos, there's a calling for a new generation of professional private security consultants to step up and provide guidance to the business and property owners who are ill-prepared to keep up with the rapid changes.

Reasons to become a consultant include: the consultant doesn't face the same physical requirements and risks as do the frontline security officers, investigators or personal protection agents; and, unlike the security agency owner, the consultant doesn't have all of the stressors associated with running a security agency such as attempting to staff security sites with security personnel; although, those who own an agency are certainly well-advised to consider adding consulting to their list of product offerings.

Additionally, there are some aspects of security consulting that are just fun: for example, offensive security operations to test the security of client properties. It's literally getting paid for trying to break into a property. Where else can you find this type of work?

More on that later.

Let's get started

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Section 2: The Basics

Throughout this course we will analyze the ins and outs of the consultant's research processes, take a look at his work product and even talk about client acquisition strategy. At first this may seem overwhelming and even a bit discouraging: "*Am I really qualified to do this research, assessing, report writing and client solicitation?*"

Don't allow all of this information to be a discouragement or a deterrent from your desire to become a security consultant. This information is included here to give the reader a wide exposure to some of the strategies that are available; but, at its core, the science of consulting is extremely simple: It's making observations and then, based on those observations, creating recommendations. That's it! It's really just this simple.

Does a site have poor perimeter protection, i.e., lack of fencing? Then a recommendation of perimeter fencing may be in order.

Simple, right?

Ok, maybe that's a bit too simple.

Let's get a little more sophisticated.

On a scale of one to five, how severe is the security risk because of the poor perimeter protection?

This determination obviously depends on the type of property being assessed.

Is this a car lot that's having a problem with car theft?

Is it an apartment complex that's facing an epidemic of breaking and entering from the gang members who congregate at the neighboring apartment complex?

Maybe it's a trucking company that temporarily stores high-value, sealed cargo containers in the yard behind their complex.

In each of these cases proper fencing would create a first line of defense to slow intruders and provide enough time to capture them on camera surveillance. The lack of a controlled perimeter is a severe risk to each of these sites.

On the other hand, maybe this site is a large church with no history of property vandalism. Fencing may offer some protection to their facility but the lack of fencing doesn't create a significant risk.

In this example, on a scale of one to five, the vehicle lot, apartment complex and trucking company are at least a three and maybe even a four or five; the church is a one.

Want to get even more sophisticated?

Let's give each of these numbered risks a named description: One equals Insignificant Risk; Two equals Some Risk; Three equals Moderate Risk; Four equals Critical Risk; and, Five equals Catastrophic Risk.

Let's consider another hypothetical example: A security consultant notices that his client does not have an emergency plan, e.g, the client does not have any planning documents to guide their response to an emergency such as a fire or storm threat.

Once again, the severity of this risk depends on the needs of the client. The owner of a mostly unoccupied mini storage facility doesn't need the same level of security planning as does the client who manages a retail plaza or corporate office and thus the consultant will score his observation differently depending on the type of client.

This scoring system allows the consultant to neatly organize his observations into a set of recommendations that the client may then take action upon.

Though these observations may be referred to by different names such as the site assessment, the security audit, or the security inspection, throughout this course, as we discuss the various means for collecting the observations, scoring them and turning them into recommendations, keep in mind that at its core, the science of security consulting is just about making observations and creating recommendations; it's really just that simple.

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Section 3: The Example

The hypothetical example of an aspiring consultant as he transitions from security officer to security consultant.

Before getting into the specifics of consulting, let's consider a hypothetical road map from unarmed security officer to security consultant.

Let's name our hypothetical security officer: He's Security Officer Tom Blart—Paul Blart's twin brother who, like his brother, works for mall security.

Throughout this course we will refer back to Blart's example and examine his successful transition from security officer to security consultant.

At first glance you may have a hard time believing that an unarmed security guard can grow into a security consultant; but, a site's security officer is the perfect person to make security recommendations. He's not sitting behind a desk in a far away location or tapping away at his computer in his home office. He's the on-the-ground individual who sees the security of the site through the eyes of the person who has to experience it every day.

How will the aspiring Officer Blart transition from a segway-riding security drone, doing unarmed-officer shift work at a basic, low-paid, mall post, to providing consultancy services?

Here's how: as he works each shift Blart will conduct in-depth foot and vehicle patrols and will become familiar with every facet of the site. He will know it both in and out. While the other officers are ghosting their patrols, trying to talk to the girl at the mall kiosk, or just doing the minimum expected of them before they can get back to the office and return to playing games on their phones, Blart will learn everything he can about the site.

Armed with this knowledge he will take to the Internet to supplement his observations with online research about the various security aspects of his particular venue. For example, he will search for "*shopping mall security plans.*"

He will then visualize the various security scenarios: "*What would happen on this site if . . . ?*"

Is this facility prepared for every eventuality?

What are they doing right and what could they be doing better?

Blart will carefully record each of his observations.

Each time an incident occurs he will make more observations and add to his notes. Was the facility prepared for the incident? How did the officers handle it?

While many officers are content to simply write up a report on an incident and move on, Blart will think through each aspect of the incident and attempt to figure out what would have detoured the incident. Perhaps there's a mugging in the parking lot. Were the cameras properly calibrated to catch the incident? If so, why didn't they detour the incident? Perhaps the mugger didn't realize he was on camera. It's great that he was caught on tape; but, well-placed "*camera surveillance in use*" signage may have detoured the incident in the first place.

Eventually Blart will compile his notes into a white paper of observations and recommendations.

As he writes the paper, he will ask himself: "*If I were the owner of this*

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property what would I really want to know about the security and preparedness of my site?"

This research and thoughtful analysis becomes a part of Blart's portfolio and is an example of work product that he can provide to future clients and employers. Even though he was only an unarmed officer, because he was on the ground, he was able to make valuable observations and write up his own version of a very basic consultant's report. See the resources section of this course for an example of an unarmed officer's white paper of observations and recommendations.

Remember, at its core, the simple science of the security consultant is simply making observations and converting them into recommendations. Even an unarmed officer can do this.

As Blart gains experience he will start developing the resume of a security consultant. For example, perhaps over the course of a couple of years Blart works for two or three of the big corporate security providers and is assigned to posts in the hospitality, auto dealer, retail and multi-residential security niches. He now has sample consulting reports for each of these niches. Blart will build his consultant resume around these reports. His resume will show security experience in the four niches and will reference his sample white papers.

During this time, Blart saves up enough money for creating his consulting business. This includes money for some basic business filings, insurance and a few standard startup costs. Depending on particular circumstances, he may not need to quit his unarmed security assignment until he lands his first clients (more on client acquisition tips later in this lesson) and depending on the regulations in his state, he may not even need a special consulting license. This keeps his out-of-pocket costs to a minimum and allows him to avoid unnecessary

expenses such as office costs.

Blart has successfully leveraged his unarmed shift work into a career as an independent security consultant.

Of course, Blart's story is just for example purposes. There are multiple avenues that the officer's career may take. As an example, instead of creating his own agency, the officer may instead continue to work for the big security corporations and provide his security consulting services through their agency—as their employee. The big security providers need talent and they should appreciate the officer's initiative to generate his own reports of observations and recommendations. He's a perfect choice to become an account manager or even a consultant for some of the agency's biggest accounts.

Resources and Research Techniques

By now you have hopefully gotten a chance to take a look at the unarmed officer's sample white paper of observations and recommendations. It's available through the resources section of this course. This has likely gotten your mind racing with ideas for how you could construct a similar white paper with your observations and recommendations from and for your own site.

But, you are probably thinking: "*That's fine for an unarmed officer's work product, but how will I learn to build industry-standard consultant reports?*"

That's a great question.

It's never too early for you to become acquainted with the specifics of the private security industry. All of this is possible through the magic of the Internet.

First, let's talk about some of the basics of knowing what is going on in the industry, then we will take a look at

some of the strategies for learning from the best—consultants who are already active in the industry.

Those who have already completed The Professional Security Officer course from The Security Officer Network may remember the following advice that mostly reads as follows:

"It's an amazing time to work in this industry. In the past, insider knowledge was just that: insider knowledge. However, these days, even the newest unarmed security officer has access to many of the information services utilized by the management of the security firms.

Make a habit of reviewing these resources. You don't need to understand everything you read at first; but, keep reading. Eventually, it's your goal to understand the ins and outs of this industry—just like the head of an agency or other industry insider.

Here are a few resources.

The Robert Perry white papers. Each year Robert H. Perry and Associates publishes their white paper on U.S. Contract Security. It's the must-read for those who want to know the latest overview of the industry. The firm builds their report after analyzing data from the annual reports of public companies, parsing public press releases, consulting their private files on more than 3,000 privately owned agencies and interviewing the owners of private security firms. These annual white papers along with other industry reports are made available to the public at https://www.roberthperry.com/ publications.

Here's an important sample piece of information from page 42 of their 2020 report: 'The US private security market currently consists of 8,000 companies with revenues of 28 billion dollars. Industry revenues are believed to have grown by 4% in the 2019 physical year.' Remember these numbers, a true

security professional always knows the size of his industry. As a professional you will monitor these reports—they are released each summer—and maintain an up-to-date knowledge. This information may seem useless now but in the future as a security agency owner, security consultant, or security manager, you will have already acquired the skillset of knowing the industry and you will have a long-term knowledge that was developed even when you were just a regular, unarmed security officer working a third shift.

The US Bureau of Labor Occupational Employment and Wages Report for Security Guards. This report tracks the census of security professionals and how much they make in wages. It allows the reader to analyze security pay by industry and location.

Find the report at https://www.bls.gov/oes/current/oes339032.htm

Why is it important for you to monitor the Bureau's information? It may guide your career choices as you choose your security niche and strategize on developing the skills that will earn the most in compensation. It's also good information for the security professional who desires a future as an agency owner or manager and who will be pricing security services; or, perhaps you will become a security consultant and will need this knowledge to advise your client on how to determine officer pay.

Thinkcurity.com and SecurityMagazine.com. These must-read services feature security industry articles and webinars. Some of their content may require free registration. Sign up with each of these and you are likely to receive a series of emails from various security vendors. At first, these may feel like spam, but don't instantly delete them. These vendor emails provide great insight into the inner-workings of the latest security products. This is must-know information!

For example, perhaps you receive several solicitations for security software products. Examine these emails, go to the sites and social media platforms for these vendors and compare their product against their competitors. Watch their demos and maybe even subscribe to a month or two of their services. Try them out on your phone and see how they work. Are they worth their subscription fees? Take notes. This information will become part of your database of potential software recommendations that you will make to your future clients. From patrol logs to compliance checklists, almost every security client will need a software solution or even several solutions and your knowledge of the maze that is the security software space will provide tremendous value to your clients.

Finally, it's very wise to pay attention to the industry-adjacent subject matter of IT security. Physical and IT security are becoming intertwined. In the future, small clients will benefit from the services of professionals who provide physical security but are also familiar with automated security technologies and their vulnerability to attack. For example, listen to The Darknet Diaries podcast at https://darknetdiaries.com/. Specifically listen to the episode entitled Jon & Brian's Big Adventure, https://darknetdiaries.com/episode/95. This episode describes the work of two penetration testers as they breach their client's physical and automated security.

Do you recall how we discussed the importance of analyzing your site from the viewpoint of those who would seek to breach it? This is how penetration testers analyze a site's security; and, they are sometimes allowed to follow-through on their observations and actually attempt to break into the site. It's hard to listen to this episode without getting excited about a potential career in 'offensive security.' Perhaps, pentesting is your future expertise.

We've just scratched the surface of available resources. It's probably one of the few downsides of the Internet age; there's so much out there to overwhelm you as you learn about the industry. Don't let it overwhelm you; but, do ensure that you are using the resources to consistently grow your industry knowledge as you continue to evolve into a true security professional."

The above advice seeks to encourage the reader to keep up with the latest from the industry. And, as an aspiring consultant, this strategy is a must-do. It provides a basic, high-level knowledge that all security consultants should have.

Now, let's take the research to the next level and examine some of the consultant-specific resources.

For example, security consultants are known to join two associations: ASIS International (asisonline.org) and IAPSC, also known as the International Association of Professional Security Consultants (iapsc.org).

The associations release various publications, newsletters, articles and blog posts related to the security industry. These are often posted on their websites and are free to the viewer. They are a prime source for locating relevant information. For example, an October of 2021 blog post by ASIS entitled Cybersecurity and Physical Security Convergence briefly described the importance of breaking down barriers between physical security,(e.g., security officers) and cybersecurity (IT personnel) and allowing them to work together. The blog post encourages readers to view an upcoming free webinar on the subject.

At first glance this may seem to be a quickly written promotional for the webinar, but to the aspiring security consultant, this is an authoritative recommendation that he can potentially cite in his recommendations to a client. His recommendation might look like this: "*Need for Physical and Cybersecurity Convergence: The client should*

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consider enabling rapid communication protocol between the private IT contractors and the Head of Security. This is a best practice as cited by ASIS International."

Upon reading this type of ASIS blog post, you should bookmark the post and watch the free webinar; but, that's not all: Start a notebook or online document of potential recommendations. Record the ASIS recommendation in this document. In the future, when making observations and writing recommendations, you will reference this potential recommendations document and determine if the recommendation will be useful for this client. The "*Convergence Recommendation*" from the ASIS post probably won't mean much to the owner of a small facility who does not have an IT contractor, but, it will be quite germaine at a larger facility where the security officer never speaks to IT and doesn't even know how to reach them if needed. You will recommend that these two be put into contact; thus, in an IT emergency, the IT contractor will have a direct line to the officer who can respond as needed; for instance, shutting down a server that's under attack.

With this strategy, in short order, you will have developed an entire document of relevant recommendations from authoritative sources in the industry. This document will eventually evolve into an important part of your consulting agency's intellectual property—a secret sauce that gives you an advantage over your competitors.

You won't limit your research to just the publications of ASIS and IAPSC. You will also source from the members and vendors of these associations. For example, at iapsc.org, IAPSC publishes the names, social media accounts and websites for some of their consultant members (tap the find a member link). These consultants will sometimes publish their own publications on their websites. These publications are great sources of information for the aspiring consultant to learn from.

Additionally, you will benefit from the courses that are offered to Security Officer Network members and the free FEMA certificates that are available through FEMAS' Independent Study Program. These trainings allow the consultant to obtain a wide array of knowledge that will prove useful when making recommendations to a client, e.g., The Security Officer Network's professionalism courses describe the specific components of security professionalism; these are important to the consultant who must advise his client on how to determine if his security officers are "*security professionals*" or if they have been impaired with the mindset of the "*security guard.*"

These have just been a few of the ideas for gaining the needed knowledge and making progress on the road map from security guard to security consultant. There are many other techniques and sources of online information that can be found by the officer who is determined to never stop learning and building his repository of consultant knowledge.

Here's another important suggestion. Many in the security industry face a tremendous challenge that keeps them from transitioning from officer to consultant: report writing.

Clients won't appreciate poorly written recommendations.

Those who need help with report writing skills should consider the PSIR Report Writing courses from The Security Officer Network's IncidentReportWriting.com. These courses feature an actual human tutor and will step the student through the ins and outs of writing for the private security industry.

One note of caution: notwithstanding the resources listed above, never lose your independence. It's your unique way of thought and independent thinking that will bring true value to the security industry. The multi-national corporations

and consolidated security companies are potentially harmful to the industry because they invest too much power with too few people. This concentration of power isn't good for private security and it's The Security Officer Network's goal to bring new, independent mindsets into the industry; however, some of the publications referenced above, such as Security Magazine, have in the past promoted groupthink and this groupthink is especially problematic in an environment where power has become concentrated. So, as you read these resources, never accept their point-of-view at face value, keep your independence and always think critically!

Making the Jump

Now that we've taken a look at some of the research strategies, let's check back in on the progress of our hypothetical security officer; Tom Blart continues his transition from security officer to security consultant.

Blart now has a couple of years of security experience under his belt. He has worked sites in several different security niches and has been given additional responsibilities at his security job. He's even been promoted to Deputy Site Supervisor.

As he has taken on additional responsibilities, Blart has continued to record his observations and write hypothetical recommendations into sample white papers. His experiences in different security niches and his role of supervisor have provided him with a diverse security industry knowledge base. Additionally, each week he has set aside a bit of time to conduct online research and has kept up with the latest in the security industry. He follows the security consultants who are active on social media. He takes note each time they release a report or recommendation paper. He downloads each of their releases into his own library of sample reports. He monitors the web for new security-industry

content and watches each new webinar and product demonstration video. He signs up for industry email lists and he researches each vendor solicitation as it arrives in his email inbox. He becomes familiar with their products and even signs up for their free test periods and tests them out.

Blart has joined The Security Officer Network and he takes all of the online training options and ensures that they are posted to his Network portfolio. He also regularly adds FEMA certifications to his portfolio.

Based on this research, and on his own experience as an officer, Blart settles in on his initial, consulting niche of choice: car dealers.

Why did he choose this niche?

Blart has been repeatedly assigned to shifts at several area car lots. He's addicted to the ambiance of the dealerships with their wide-open showrooms and waxed, shiny floors with floor-to-ceiling windows and the latest models of new showroom cars. The ambiance becomes especially strong during the overnight shift when Blart is the only person on the property. During these night shifts Blart has repeatedly walked the site and closely inspected all aspects of the property from fire suppression system to perimeter fencing. He has also worked the daytime shift assignments and during these assignments he's learned much about the ins and outs of the dealership's operation. He has made and recorded his observations and put together several practice white papers.

Here's one example of an important observation made by Blart: He astutely observed the inconsistent vehicle key custody policies of the various dealerships. These policies seem to vary at each location. These keys are frequently assigned to a diverse group of users: sales persons and their customers for test drives; the lot porters when organizing the lot; the vendors as

they perform maintenance on the cars such as refreshing the satellite radio service or fixing dents on the vehicles' exteriors; the in-house car detailing and washing team as they try keep the vehicle clean; and the service staff performing routine maintenance.

Blart has noticed a variety of key-control systems in use. Some dealerships have efficient systems such as an electronic safe that requires a key code to open and a logging system for logging the custody of each key. Others simply hang the keys on coat hooks and are unable to know who has what key and when it is going to be returned. In some cases keys have gone missing for days at a time and the store has to have a replacement key created. Worse still, from time to time, vehicles go missing for several hours only to later "*show up*" again on the lot. When this happens the dealership's personnel spend hours reviewing surveillance camera footage to determine who took the car off of the lot and why; it's a real pain.

Additionally the lot employees are frequently seen wandering around the lot looking for a car while continuously tapping the alarm button on the car's key fob. These constant car alarms annoy potential customers and might even cost the dealership a potential sale or two. It's just a bad system all the way around.

After making these observations, Blart conducted his own research and became familiar with the different key custody systems and new technologies that are available, their cost and their advantages and disadvantages. He has written up a series of sample recommendations and has placed these into his document library. He's now well-prepared to make key-custody recommendations to his future car dealer clients.

But, Blart didn't stop there. He's also noticed that some of the vendors who offer key-custody solutions also offer inventory tracking technology. None of

Blart dealership sites are using these solutions. Blart asked one of the dealer's general managers about why they don't use the tracking technology on their inventory; the manager said it was too expensive. But, Blart knows that the price on the technology has rapidly dropped in the past couple of years and realizes that most dealerships do not realize how very affordable it has become. Technology is rapidly changing, becoming more effective and better affordable and Blart's curiosity on this subject matter has positioned him to make great recommendations to his future clients. His clients will be able to track their inventory and this will lower their insurance rates. The insurance company knows that if the tracking prevents just one car theft, it will pay for itself.

This, in addition to his other research, positions Blart to start his own security consulting agency. He files the new business paperwork with the state, builds a website using the WordPress platform and starts developing an attention-getting lead generator.

Blart's attention-getter is a special report. It's designed for building relationships with potential customers. Four times a year, Blart goes to the open data portal of his local city government and downloads the spreadsheet of auto thefts by zip code. He then compares the data with the data from the previous quarter and plugs the results into a spreadsheet. He generates a top ten list with some pie charts showing the zip codes where thefts are becoming more frequent and then attaches a summation with a few paragraphs explaining his observations related to vehicle thefts in the area. He also promotes the GPS tracking technology as a possible solution for this problem.

Once he has generated his first report Blart lobbies his security company employer to put him back on an evening or night shift. He then uses his free time

during daytime business hours to distribute his report to potential clients: sometimes online and sometimes in person.

Blart utilizes the research techniques described in How to Get Clients for Your Private Security Agency eBook to profile his targets and locate the decision maker for the target organization. We will take a deeper look at this in The Client Acquisition section of this course. Blart then makes contact with the target, provides the free report and lets the target know that he is standing by to assist with security needs.

Note, though Blart is creating a report about vehicular theft, any public safety subject matter works. Local governments often post a variety of public safety data sets and the type and quality of this data will guide the officer as he decides on the subject matter for his report. We will more closely consider this matter in a future section.

Blart doesn't distribute his report to the big, dealer-class dealerships where he has worked security. This is for two reasons: first, though he has relationships with dealership management, he doesn't want to be perceived as competing against his security employer. Remember, he still needs an income and he is still working the night shift at the dealerships as an employee of a big security company; Second, he knows that big, dealer-class car lots will hire a new consulting agency until it has a proven history of work with other clients.

Instead, Blart targets the many mom and pop, small, independent car lots. These are small operations so they don't have a lot of money for security; but, Blart's report about area auto thefts is interesting to them and it's a conversation starter. These conversations allow Blart to determine the pain point of the independent lot owners: In order to compete against the big dealers, the independent lots offer risky car loans to buyers who are a

credit risk and who can not afford the nice cars at the big dealerships. These loan agreements allow the independent lot to repossess the vehicle after one missed payment; however, the vehicles frequently go missing and the lot has to hire a vehicle scanning service. These are the services that pay drivers to drive around the low-income areas of town with a plate scanner and they charge the lot for this service.

As he listens to the lot owners describe this problem, Blart remembers his research about vehicle tracking technology. He knows that this technology has become affordable, even for small lot owners and the tracking technology can be used to locate the vehicles when the borrower stops paying. This knowledge allows Blart to craft a special proposal: for a modest retainer he will assist the lot with securing the latest, most dependable and affordable tracking technologies.

Blart has just become his city's foremost consultant regarding tracking devices for the purpose of repossession. In time he will expand his services to include different areas of specialization and general security consulting; but, in the short term, he can quit his security officer job and use the income from the independent car lots to pay his bills as he continues to build his consulting firm.

This officer has demonstrated the importance of intellectual curiosity. He could have spent his unarmed security shifts playing games on his phone or goofing off in the customer lounge; but, he wasn't content to just remain a "*security guard*" and was willing to ask the questions, do the research and plan for something better: private security consultant.

Section 4: The Services

Now that we have established the roadmap of Tom Blart's career path, it's time to take a brief look at the different types of consulting services he might choose to offer. Note, this isn't an all inclusive list. A consultant can offer an array of services. This is just an attempt to create a classification of some of these services. This should provide the reader with an idea of how to categorize service offerings.

Here are some of these services.

Security Assessment and Recommendations

The consultant conducts a site assessment and based on his observations he draws up a series of recommendations. The client can then do whatever he wants with the recommendations. He may choose to implement all or some or he may disregard them; it's his choice. The assessment can be provided for a one-time fee or it might be performed as a freemium service that builds a relationship and entices the client to hire the consultant for some of the other types of services.

Development of Security Policies and Procedures

The consultant assists the client with creating and writing a security plan, post orders or security policies and procedures for his site. Components of the plan could include just about any aspect of security and incident preparedness such as fire and storm response, security officer patrol policy, incident response and reporting, access control, post orders, parking lot traffic policy and more.

Benchmarking

On a periodic basis, such as once a year, the consultant returns to the site and assists the client with a progress report. He analyzes the client's inventory of incidents. What went right in the last year? What were the challenges? Are things generally moving in the right direction and getting better? What changes need to be made to the site's security plan? Do more security officers need to be hired? Are the site's surveillance cameras becoming outdated? Have new local ordinances been approved that require the site to add additional exterior lighting? Have falling technology prices now made it affordable for the client to invest in new time and labor saving technology solutions that were previously too expensive for the client's budget?

Think of benchmarking like an annual doctor's visit. The doctor puts his patient through a physical exam, talks to him about a healthy lifestyle and encourages him to eliminate bad habits.

General Consulting

For a monthly retainer, the general security consultant is on call to advise his client on all things security. Is the business owner trying to decide if he should renew his contract with a security officer company? Or, maybe he should make the switch to in-house security? The consultant will help the client to analyze his current level of service and run the numbers to determine the best approach.

Offensive Security / Penetration Testing

This is by far the most fun of the service types. This consultant tests and even tries to breach the client's security. Perhaps the client has sensitive information such as high-value intellectual property on his computer systems. The consultant or his employees/contractors will attempt to

make entry into the client's facility and access those systems. He will then write a report describing the strengths and weaknesses of the site's security and making recommendations for improvement.

Training

A training consultant provides training to the client and his employees. This may include one-time classes such as training officers to implement the site's newly written security policies and procedures; or, the training may be an ongoing commitment; for example, a monthly training session for the site's newly hired security officers.

Of note, many security consultants will offer more than one of these services. For example, a security consultant might begin his relationship with the client by offering a security assessment with recommendations; then, he might draw up the security policy and procedures; next, the client may ask the consultant to stay on as a general consultant who provides ongoing advice, benchmarking, penetration testing and training.

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Section 5: The Specialist

Now it's time to take a really big picture look at some of the types of subject matter consulting performed by the private security consultant. We will examine several examples of how a consultant can market his expertise to a very specific niche of the private security world.

As we review these examples, take notice of how very niched-down or specific some of them are. You may think, "*I didn't know this very specific subject matter could justify the attention of a security expert.*"

These niche-specific areas of expertise are an example of why the need for security consultants is likely to accelerate in upcoming years. In an ever-more-complex world of increasing regulation and privatized security, business and property owners need assistance from security specialists and this includes extremely niched-down subject areas. This provides you with the opportunity to make a good income in the security industry.

As you review the various categories, you are likely to notice a category or two where you have personal expertise because of your experience as a security officer.

Business Type Specialists

First, let's examine the various business-type categorizations in which a consultant might choose to specialize. These are the same segmentations/ niches that a security agency owner categorizes his security offerings and if you are already working in the security industry then you are likely to have some familiarity with this categorization scheme.

What follows are a listing of these categories and examples of the types of entities that are found in those categories.

Banks and Financial: sites that are notable for their large amount of high-value assets.

Construction and Open Air Sites: building construction sites; public project development projects such as highway construction; and industrial open air sites including oil field and pipeline projects.

Corporate: corporate campus and multi-tenant offices.

Dining and Entertainment: restaurants, theaters, night clubs, bars and casinos.

Education Campus: multi or large building campuses such as a high school complex or a college campus.

Education Single-Site: single-facility education sites such as a private school or an elementary school.

Events: convention centers, sports venues and outdoor events such as parades or concerts.

Healthcare: hospitals, assisted living facilities and clinics.

Hospitality: hotel and motel.

Industrial, Manufacturing and Power Generation: industry-centric sites with complex equipment.

Personal Protection: protection of well-known or high-net-worth individuals (aka bodyguard services.)

Religious: churches and religious organizations.

Residential: apartments, HOAs and personal residences of high-net-worth

individuals.

Retail Single: retail stores, grocery stores, convenience stores

Retail Multi: retail plazas and malls.

Transportation: airports, shipping ports, train, bus and subways stations and rail infrastructures.

Warehouse and Storage: industrial storage facilities and personal-property storage units such as mini-storages.

Vehicle Lots: dealerships, auto auctions and rental agency lots.

Always remember the importance of distinguishing between these niches. The consultant who is skilled at writing recommendations for a church or a religious organization will need a specific knowledge of best practices ranging from traffic control in the parking lot, to protecting a large crowd of worshipers who are congregated into a concentrated location, to online monitoring and threat detection from those who may be inclined to target the organization because of their religious views.

This contrasts with the consultant who focuses on the residential niche and who must advise an HOA on best protocol for nightly patrols in order to protect a population that's distributed across numerous residential locations and isn't concentrated in one place.

Neither of these consultants needs the specific, healthcare-related knowledge of the healthcare niche consultant.

In the previous section as we reviewed Tom Blart's roadmap from security guard to security consultant, it became obvious that he would specialize in the niche where he has experience and interest, in his case, auto dealers. Over time, as his experience grows, he will likely find that he's qualified to make recommendations in multiple niches; but, a qualified consultant will always

make specific recommendations tailored for the client's specific niche and will never attempt to fit a one-size-fits all template to all niches.

This targeted, niche-based specialization provides the consultant with a competitive advantage as he competes for a client's business.

Who will the residential HOA be best advised to hire? The security consultant who has experience in the residential niche or the consultant who gives the exact same advice to a religious institution, a healthcare facility, a car lot and a residential area?

Subject Matter Specialists

You name it and you can specialize in it.

What follows are just a handful of subject-area specialization examples.

Access and Entry Control

The access and entry control consultant advises his clients on access control systems and conducts access audits such as key system audits, i.e., are all of the keys accounted for and is there a system of control in place to prevent unauthorized entry.

Emergency Preparedness

This consultant establishes a site's emergency response plans, reviews the site's physical infrastructure (such as fire suppression sprinklers) and ensures best maintenance practices are followed. This consultant learns and helps the client into compliance with local ordinances.

Industrial and Industrial Control (ICS) Systems Security

Here's where physical security meets technology. Which of the client's employees and contractors has physical access privileges to put a USB stick into an offline, industrial control computer?

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Are each of these access points monitored 24 hours each day by camera surveillance in order to discourage potential compromise?

Internal Investigation

From new hire background investigations for the Human Resources Department, to incident investigation such as disappearing inventory or employee theft, internal investigations are a challenging subject area and the client needs to know how to accomplish these in a legally compliant manner.

Hazardous Materials (HazMat)

What is the client's policy for ensuring hazmats are correctly marked, transported, stored and monitored? This consultant creates the HazMat policy, draws up the HazMat training materials for the site's security and maintenance teams and monitors its implementation.

Insurance

The Security Industry Insurance Consultant assists with developing security policies and procedures that best leverage insurance benefits for the client and prove that the site owner is entitled to lower insurance premiums. This consultant may also help the client to locate the insurance plans for his industry and security situation.

Governmental

Business owners need guidance through the rapidly changing governmental and political environment. As an example, in 2021, as San Francisco retailers became the target of mass dash and grabs, the local DA attempted to incentivize retailers to submit reports to a tracking database. Is this database an effective tool for tracking and ending retail theft? Is it working? Or is it just an ineffective, waste-of-time meant to give local politicians cover for their support of the policies that allowed the retail crime wave to go parabolic in the first place?

Here's another example: Some politicians respond to a rise in crime by requiring businesses to hire security officers. The security agencies who know about these proposals will be best prepared to compete for the new security contracts and the security consultant will keep his security agency clients informed about these new changes.

Legal: Liability

This consultant advises on the potential legal liabilities of a client's security portfolio. He may also offer expert witness testimony in court cases and assist with determination of liability.

Legal: Regulatory Policy

This is an area so diverse that a specialist may want to pick a sliver of this subject matter in which to specialize. For example, the regulatory environment for security varies from state to state. An entrepreneurial consultant can counsel his client on how to adjust to the legal environment in each jurisdiction. Perhaps it makes sense for the client to use contract security in some locations, but in others, with different regulations, he should create an in-house security operation. Or, another example, perhaps the Legal and Regulatory Policy Consultant will become an expert at creating specific training for the client's in-house officers related to best arrest and detention practices in each jurisdiction. The possibilities are endless.

Loss Prevention

The science of discouraging and preventing retail theft: it's grown ever more complicated and there's a real need for the consultants who can advise on the best practices that will minimize the impact of this growing epidemic.

Physical Security (Construction)

The astute business owner will consider security from the moment he

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begins designing a new facility. A physical security consultant will be prepared to advise on the newest, most innovative and best security practices.

Perception Management

The perception management consultant develops strategies for providing needed security services while minimizing the risk of a negative public perception event. The ubiquity of smartphone cameras has made this type of strategy a "*must have*" for high profile clients such as candidates for elected office, government agencies, public companies and religious organizations.

Property Protection (Exterior)

From vehicle barriers, to camera surveillance, to automated parking lot gates, the science of exterior property protection is a comprehensive one.

Security Personnel and Staffing

How many security officers does a business need? The Security Personnel and Staffing Consultant guides his clients through the strategy of personnel hiring and assignment. He also assists with the creation of training and professional development programs for those officers, e.g., the consultant may develop a curriculum based on The Security Officer Network's open source curriculum and customize it to meet the specifics of the site.

Software

There are an ever-growing number of security-related software products being developed and marketed. The software consultant can guide the client through the maze of competing products and put together a recommendations list of the products that best fit the client's needs. From security patrol logs to compliance checklists, this consultant will assist her client with figuring out what is needed and what is not.

Surveillance and Camera Technology

This consultant not only guides his clients through the complicated decision of which surveillance/camera technologies should be used and how they should be placed, but as technology rapidly advances, he also advises on tricky and related legal issues such as: Will the site's surveillance system include advanced facial recognition technology? If so, will the site share it with law enforcement in real time?

Threat Monitoring, Detection and Research

This area of subject matter includes consulting on items such as establishing a program to conduct online research for threats against a facility. For example, a well-known political or religious organization may wish to monitor the web and the dark web for developing threats against its physical locations or members. Or, a legal team may need a strategy for monitoring social media during a trial; they will want to crowdsource sentiment and expertise from those online who are viewing the case and may have valuable input that's outside of the lawyers' natural skillset.

Traffic and Parking

This consultant provides advice on the handling of on-site vehicular accidents, examines parking lot physical design and suggests updates for better traffic flow. This includes creating vehicle accident reports, ensuring security officers receive appropriate accident investigation training, teaching traffic control strategies and adjusting traffic policies based on past experiences at the site.

Transportation and Traffic Logistics

Security policy isn't just limited to the client's physical location but follows the client's property and services wherever they go. Applying security policies to objects that are in a state of transit can be a tricky proposition. This subject-area seems likely to become more important in the near future as the police become

less able to provide basic services such as traffic control. Examples include: transportation of oversize loads and/or objects of high value; protection of client employees as they perform tasks upon or near the public roadways, e.g., private utility crews clearing trees away from utility lines; and, security for motorcades and processions that are privileged from compliance with traffic control devices, e.g., walks and runs or funeral processions.

The above are just some of the examples of subject areas where a consultant may specialize.

In the past the consultant was likely limited by his local jurisdiction. This made niche-specialization difficult. How many businesses in a single city need a hazardous material consultant? But, with the magic of the internet, the consultant's reach isn't just limited to his physical location. Why not become the security industry's preeminent hazardous material specialist? Not limited to just the industrial sites in a single community, the hazmat specialist potentially serves clients nationwide or even worldwide.

Did any of the subject matter categories catch your eye? Based on your life experiences, you probably already possess a basic familiarity with at least one or two business type or subject area niches.

SEC CON
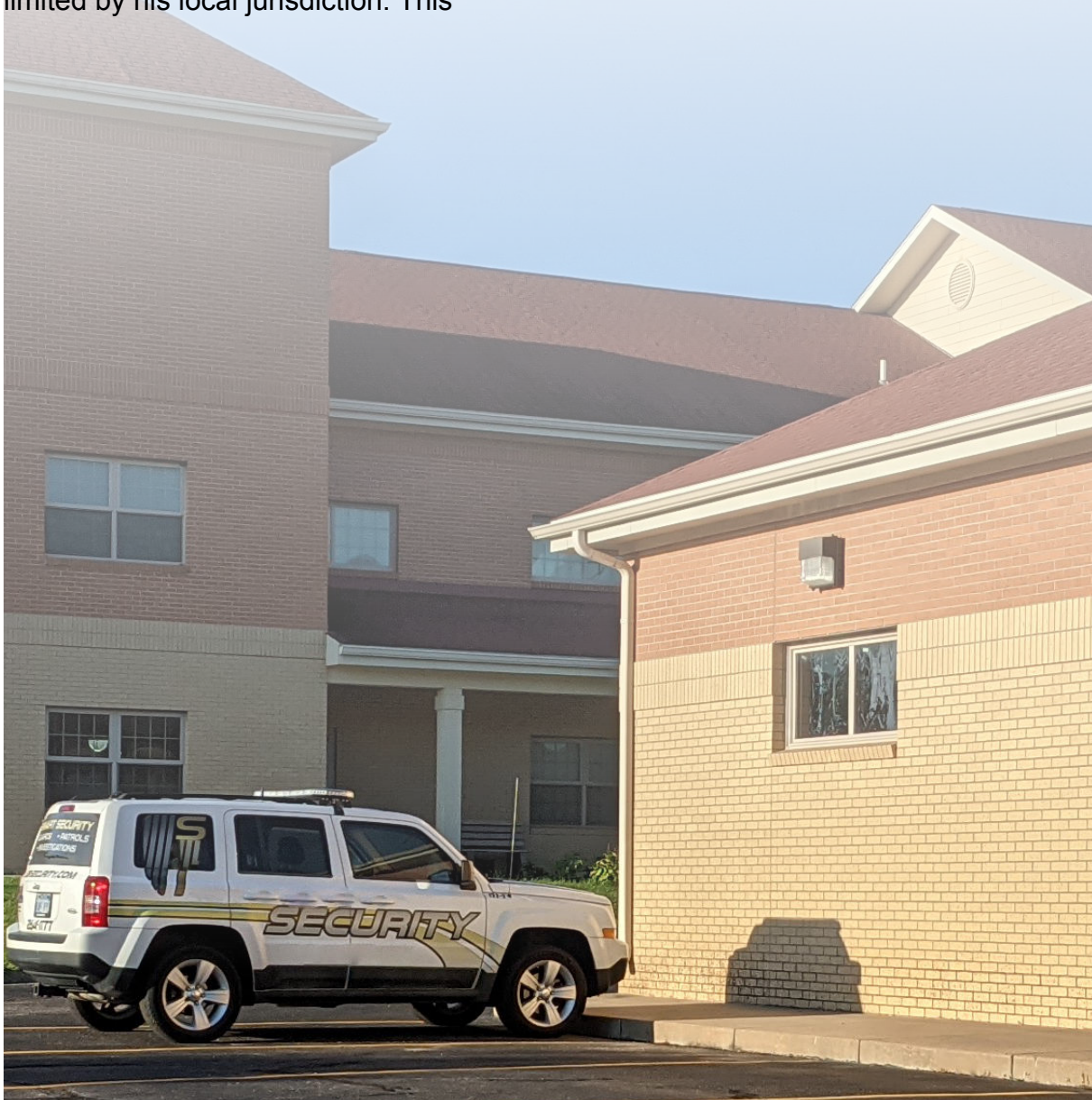
Section 6: The Ethics

Before we go too much more into the exciting world of security consulting, let's first take a minute to analyze the ethics of the professional security consultant who wants to build a reputation as ethical and fair. This is an important subject and it's one you will be able to use in your marketing efforts. As an "*ethical*" consultant you can distinguish yourself from those whose interest lies with their personal income and not with the client.

For the sake of simplicity, as we analyze the best ethical practices, let's broadly categorize security consultants into the following three categories.

1. The Independent Consultant

The independent consultant provides only consulting services—no other services—to his client. He doesn't receive a commission or payment from any third-party persons or companies. The independent consultant doesn't need to worry about a perception of bias and he's free to make his recommendations based on the client's specific security situation and nothing else. He's incentivized to produce the recommendations that best fit his client's security needs and financial situation because he has no conflict of interest.

While the independent consultant will likely charge more than the other types of consultants, in the long run, the client may save money because they are not tied down with recurring consultant fees, services, or unnecessary products and technology that's too expensive for their needs.

2. The Commissioned Consultant

The commissioned consultant receives commissions from third-party security service and product providers. This means the consultant's services can be offered to the client at a lower price than that charged by the independent

consultant; however, the commissioned consultant has financial incentive to promote products and services that may not be a best fit for the client.

3. The Multi-Service Consultant

This is the consultant who provides services and products in addition to consulting services.

For example, a security agency that provides consulting and security officer services, investigative services and alarm monitoring and response. This consultant has incentive to recommend his own services to the client.

This consultant will likely use his consulting services to direct the client to his other service offerings.

Disclosure of Conflicts of Interest.

The ethical consultant discloses his perceived conflicts of interests to the client—prior to creating a report.

In some cases the consultant's motivations are obvious. For example: perhaps a multi-service consultant owns a security agency and offers a free security assessment to a potential client. He's using the assessment as a tool for relationship building and is positioning himself to become the client's future security provider of choice. This consultant's motivations are obvious.

In other cases, the consultant's incentives are harder to determine. Perhaps the consultant receives a commission from a security alarm and monitoring company; each time the consultant makes a recommendation to the alarm company, he receives a commission. This consultant should disclose this relationship to the client.

The ethical consultant provides his client with a list of the companies that pay a commission; and, he will provide

this list before the client agrees to hire the consultant.

The client should also be informed of any other services provided by the consultant's agency. If the consultant's agency also provides security officer services then the client should be told about this before he agrees on a price for the consultant's report.

Put yourself into the place of the client who has paid a couple of thousand dollars for a consultant's assessment and report. As he nears the end of the report, the client realizes that his consultant has basically written a marketing brochure for the consultant's future services: "*Did I just pay this guy for pitching his business to me? What a rip off!*" Even if this report is well-written and contains excellent recommendations, the client will still suspect that he has been given biased advice.

All of this said, the up-front disclosure process is an opportunity to show the potential client a portfolio of example work product. "*Here is a list of commissions my agency receives. These commissions allow us to keep our client's costs to a minimum. Also, here are some examples of sample reports that my agency has created. As you can see, while we do make recommendations on behalf of third-party affiliates, these products allow our clients to meet their security needs in a cost-effective manner.*"

Disclosure of Ongoing Dependency

Consultants may be broadly categorized into two basic categories: passive and active.

The passive consultant writes his findings and draws up a set of recommendations for the client to follow. It's then incumbent on the client to accept or reject the consultant's report.

The active consultant remains actively

engaged in the site's security. He monitors the implementation of the recommendations, draws up a site's security policies and procedures, creates training programs, performs ongoing benchmarking and trains officers and other client employees

Before starting an assessment and report, the consultant should determine the client's long-term plan as it relates to independence or dependence on ongoing consulting services. If the client desires to be independent, i.e., not requiring the ongoing services of an active consultant after the initial report has been produced, then the consultant will need to account for this in his recommendations.

Finally, as a best practice and for the sake of simplicity, always apply The Golden Rule: simply treat the client as you would want to be treated were you to be in their position. Do this first and foremost and everything else will tend to take care of itself.

This covers some of the basics of ethics and disclosure. Now we can move on to the exciting stuff!

Section 7: The Tools

Before we start work, let's first organize our tools. Just as the professional builder assembles his array of tools and keeps them inventoried, maintained and organized, the professional security consultant carefully builds and maintains his own toolbox of intellectual property.

What follows are some of these tools.

1. The Potential Recommendations Document

You may recall the description of this document from earlier in this course: it's a list of the potential recommendations that a consultant might offer to a future client. A previous section in this course described how a security consultant might read a blog post on the ASIS International site and record that suggestion as a "*potential recommendation.*" In the future, should he choose to use this recommendation in one of his reports, the consultant will cite the ASIS blog post as the authoritative source. This adds credibility to the report; this isn't just the recommendation of the consultant, but it's also the suggestion of the ASIS International writer.

The consultant who takes the time to research and stay up-to-date with the security industry will quickly develop an extensive library of "*potential recommendations*" from which they can draw numerous authoritative security suggestions.

There's no set rule for how to format this document; however, recommendations should be categorized by niche. This is as simple as creating a document and placing a niche header above the recommendations that are relevant to that niche. This allows the consultant to open a document, do a word find for the name of the niche and quickly scroll through the recommendations for that niche.

As the consultant's list of potential recommendations grows. His system can grow and become more complex: For example, he may choose to copy his recommendations into a spreadsheet with a separate tab for each niche.

As it grows, this library of citable recommendations will become a key component of the consultant's intellectual property and will provide him with a distinct advantage over other consultants in the industry.

2. Standards

As they make recommendations, security consultants draw upon the knowledge of other professionals and their organizations. These organizations publish standards. These standards are suggested rules and the knowledgeable consultant will reference these rules in his recommendations to his client.

Examples of standards include the Illuminating Engineering Society and their guidelines for lighting, the National Fire Protection Association and their fire codes and the International Fire Code (IFC) and their many standards/codes including their hazardous materials provisions.

Don't google these standards just yet. Because, if you do, you will immediately protest, "*How do you expect me to afford these?*"

When you become a high-powered, highly paid security consultant you can purchase the standards; but, until then, you will probably need some strategies for accessing these at no cost. In just a minute we will discuss these strategies.

So, stay with me here.

Before we figure out how to get access

to these standards at no cost, let's first take on an example of how a consultant would make use of the standards.

Perhaps the consultant has been asked to create a security assessment at an industrial warehouse. As he examines the facility, he notices that workers are storing corrosive materials against the back fence; the fence is just 5 feet from the public alley. The consultant has knowledge of the International Fire Code's corrosive materials usage standards and knows that these materials are not supposed to be stored within 20 feet of a public alley. Fortunately, because he is familiar with these standards, he also knows that there is an exception to the rule: the company may continue storing the materials in this location but they will need to install a fire wall. Because of this knowledge the consultant may provide more than one remedy: the business can either store the materials in a different location or they can install a fire wall.

Ok, now that we have seen an example of how to use these standards let's take a look at who makes them and where to find them.

The previously referenced International Fire Code (IFC) standards cover many aspects of safety policy. The standards are published by The International Code Council (ICC) and are often incorporated into the laws of the government, i.e., they aren't just suggestions, they are the law.

A quick visit to the council's website at iccsafe.org drops the user into a confusing maze of membership solicitations, policy advocacy, podcasts and more. A new visitor to this site risks going down the wrong path and paying massive subscription fees or unnecessarily purchasing PDFs of the council's codes. None of that is necessary. You will find the codes for free at codes.iccsafe.org. These codes range from building codes, to the previously mentioned fire code, to the residential code. Just tap your code of

choice, select "*View as Basic*"—avoiding the "*subscribe to premium*" solicitation attempt—and you will see the code of your choice.

Let's open the fire code and try to find the corrosive materials section from the previous example. From your computer, navigate to codes.iccsafe.org, tap the 2021 International Fire Code and select "*View as Basic.*" On the left you will notice a table of contents. Scroll down to and click "*Chapter 54 Corrosive Materials.*" The right-side of your screen will now populate with the contents of Chapter 54. Scroll down to Section 5404, "*Storage*," and notice Subsection 5404.2.2, "*Distance from storage to exposure.*" Here you will notice the corrosive materials storage standard.

Simple enough?

The aspiring consultant will read through the various sections of the fire codes, become familiar with the provisions and be prepared to include these in his future reports.

Now you can understand why many business owners do not have the time to navigate the chaos and tricky solicitations of the iccsafe.org website. They would much rather hire a consultant who has taken the time to become knowledgeable about these matters.

At this point you may be asking, "*Why are the ICC publications offered for free? Am I doing something wrong by ignoring the solicitations and using the free material?*"

In short, no! ICC probably can't charge money for reading their standards because these standards are used by governments. As they make laws, these governments incorporate the standards by reference, i.e., they don't copy the ICC standards word-for-word into their statute/ordinance books, they simply say, "*we are adopting the ICC standards.*" And, thus, it would be wrong to make a taxpayer pay for the right to

read the laws that apply to his business.

The ICC isn't the only standard-creating organization. For example, The National Fire Protection Association (NFPA) at nfpa.org creates codes and standards related to fire and electrical hazards. Like the ICC, the NFPA is happy to sell you a PDF of their codes but the information is also available for free. Their NFPA publications touch on multiple issues of relevance including fire suppression systems, fire doors, parking garage best practices and more. To view these documents, go to nfpa.org, tap "*Codes & Standards*", then select "*Free access*" and click "*View the list of NFPA's codes and standards.*"

Let's take a look at one additional method for locating helpful recommendation material: It's the Illuminating Engineering Society's (IESNA) Lighting Handbook. This helpful publication explains the best lighting practices and it's a neat tool to reference when auditing a client's parking lot, exterior hallway lights and anything lighting oriented that has an application to safety and security.

If you search for this book on Amazon you will probably notice that it sells for several hundred dollars. You might want to purchase this book—when you are a superstar consultant who has plenty of money to waste. That's probably not you so your best bet is to head over to the Books to Borrow page of the Internet Archive at archive.org/details/inlibrary. Simply type "*IESNA lighting handbook*" into the search bar and you can immediately borrow the book for the next hour. When your time expires, just re-borrow the book.

You will notice that this is the 9th edition of the handbook; it was published in 2000. IESNA has since released a 10th edition, so this information, especially with the spread of LED technology, has become a bit dated. But, it's still a great authority to reference.

Additionally, IESNA has published a list

of 100 free historic papers. These provide you with some historical fact references for your recommendations. And they have started printing standards online, for a fee.

Ok, so now that we have an idea of how to find standards, let's track down local ordinances. Ordinances are the laws published by local governments. Sometimes, as we previously mentioned, these ordinances simply adopt the standards of organizations such as the International Code Council. It's important for the consultant to know the standards that are in use in his client's local community and he can usually find the local ordinances simply by searching for them.

Let's use the world's best search engine, search.brave.com and search for the Dallas Texas ordinances. Our first result takes us to the city's code page where we can open the American Legal Corporation's posting of the ordinances. On this site we will select Texas, then Dallas and will expand the Volume 1 drop down that's located in the panel on the left side of the screen. We will then scroll down to Chapter 12B and take a look at the Convenience Store codes. Take note of the very specific exterior lighting requirements in Subsection 12B-22: "*Exterior lighting that illuminates all sides of the main building, parking areas, and fuel pump islands must be provided and maintained. Exterior lighting must be turned on daily between sunset and sunrise. In this section SUNSET and SUNRISE mean the time of day published on the weather page of the Dallas Morning News as the time for sunset and sunrise on that day in the city.*"

It's important for the Dallas-area, convenience store security consultant to know this rule. As he conducts his security assessment he will look for lights that have been long-burnt out and not replaced and will cite ordinance 12B-22 in his recommendations.

Now, scroll down to Chapter 16, The

Dallas Fire Code: yup, there is our friend, the International Fire Code. It looks like this code has been adopted for use in Dallas; however, as you will notice in Chapter 16, Dallas may have added their own amendments to this code and the reader is advised to check with the Dallas Fire Department for these amendments.

All of this may seem overwhelming, but it's not. It's important for the new consultant to do research and know where to find and how to read standards. Over time, as he specializes in a specific niche of consulting, he will study and become very familiar with a specific set of standards, e.g., from our previous example, the International Fire Council's hazardous material standards. However, when first getting started in the industry, the consultant shouldn't worry too much about knowing every aspect of every standard. He just needs to know where to find them. Then, when it's time to do an assessment, he will know how to find the applicable standards and will use them to validate his recommendations.

3. Assessment Forms

Let's move onto the assessment form. This is the scoring sheet that's used to mark up the consultant's findings. There is no firm set of rules for how this form appears or how it should be laid out; however, as a rule of thumb it should be easy to read and inform the reader of the state of a property's security.

The assessment form goes by many different names. It may be called a "*site audit*" or "*security assessment.*" This form can be as simple as a one-pager or might be a multi-page, multi-section breakdown.

At first, it may be tempting to create a one-size-fits-all form for all client properties. This is a lazy thing to do and it is a mistake. Instead, the wise consultant will develop a customized form for each niche and for each type of assessment: A convenience store assessment form won't provide much value to the apartment complex property manager.

This niche-based assessment approach provides true value to the client. The smart consultant carefully develops a niche-based customized form and markets this assessment as his own intellectual property that can not be matched by any other consultant. Over time, as he conducts more assessments, he updates this form and tweaks it into a state of perfection.

For example, Tom Blart specializes in vehicle tracking devices and inventory control. His inspection form will include data points such as "*Does the client utilize inventory control and tracking services?*"

For the purposes of illustration three sample assessment forms are linked from the resource section of this course.

The first of these forms, the simple form, is a one-pager; it allows the consultant to check off the basics. This is ideal as an inexpensive lead generator that's provided to the client for free and is mostly used to build a relationship that may lead to a future business relationship.

The second example form is a bit more substantive. It's targeted at the apartment niche. This twenty-three page, fifteen section survey isn't just a checklist but is a tool for educating the reader. Each listing features a detailed explanation of the item's importance.

The third example was created by the Hotel Security and Safety Committee for assessing the security of hotels: it's a neatly organized and categorized list of checklist items each with a sentence or so of explanation.

Keep these three examples for your files.

There, your toolbox already has three assessment boilerplates to draw from.

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4. Site Policies and Procedures

After you have completed your site assessment and made your recommendations, your client may ask for help putting together his policies and procedures. There's no set formatting for this document. It will vary based on the client's needs. It may be a simple set of post orders, or it may be a more advanced security plan and contain a pre-planned reaction for every possible security contingency.

You may find that example security plans are difficult to find online. For obvious reasons, security plans shouldn't be placed into the public domain and that's what makes finding them difficult; thus, the importance of keeping boilerplate security plan text in your toolbox of resources.

For your consideration, in the resources section, you will find a link to the federal government's security policies for hydro power facilities. This plan contains 80 pages of security policy goodness. Neatly divided into 15 sections, policies range from access control to radio communications to sabotage response procedures. These policies provide you with a neat example of a security policy work product; download this document and keep it in your toolbox.

5. Previous Work Product

This probably goes without saying, but, you should keep a copy of all past work products: security assessments, recommendations, security plans, all of these provide material to draw on for inspiration. These are also marketing tools; you will show them to perspective clients as an example of your quality of work. Just remember to scrub identifying details so as to protect the identity of your previous clients.

Your previous work product library will include the observation and recommendation white papers that you wrote up while still a security officer. Even after you are no longer working a daily security shift, these insights will still remain valuable to you and your future clients. They are the observations of the on-the-ground, in-person officer and thus they still have great value.

6. Books and Publications

The previously mentioned Internet Archive's online lending library at archive.org/details/inlibrary offers access to a host of private security books. Some of these have become dated but that doesn't diminish their value because they are still a great source for understanding the industry's history. It's always good to spice up a set of recommendations with a historical reference or two. Search the library for "*private security*" and bookmark some of the most helpful books. For example, Arthur Bilek's Legal Aspects of Private Security could prove helpful when advising the client on the legal aspects of security enforcement.

Don't hesitate to build a physical, actual library as well. Keep an eye out at your local thrift stores. You may find an occasional security industry textbook at a price that's far less than can be found on Amazon or Ebay.

Start building your toolbox now! It's as simple as creating a new folder on your hard drive, prepopulating it with the resources from this course and continuing to add to it as you do your research, write your white papers and build your document of potential recommendations.

Even if you are still in the on-the-ground, unarmed officer stage of your security career, it's not too soon to begin collecting your consulting tools.

Section 8: The Setting Expectations Meeting

It's that last thing a consultant wants: An unhappy client who is upset because the consultant's report does not meet the client's needs. Before the consultant gets to work he must ensure that he and the client are on the same page. This meeting of minds is accomplished during a "*setting expectations*" meeting.

The consultant meets with the client, determines the client's needs and informs the client of how the services will be provided.

Is the client asking for a security assessment, if so, what are the aspects of the client's facility that need to be assessed?

Perhaps the client is expecting a simple checklist of basic items such as the simple one-pager assessment.

Or, maybe the client needs a comprehensive assessment of all aspects of his operation. He may need this assessment for insurance purposes. This in-depth consultant's report will be the proof that he meets the insurance company's requirements.

The client may have become involved in a lawsuit and he needs an assessment to demonstrate that he is complying with the local ordinances and standards such as the International Fire Code.

It's possible that the client doesn't need an assessment at all. He may simply want assistance with putting together a set of security policies and procedures or might just need to retain a general security consultant.

Once the consultant has determined the client's needs, he will show the client some of the material from his toolbox. This includes past reports of similar work (for ethical and privacy reasons the

consultant may need to carefully de-identify his previous clients from these reports.) This also includes reviewing the assessment form with the client, tweaking the assessment form to include everything the client needs to be assessed and analyzing the potential recommendations that the consultant may make. This helps avoid ugly surprises. No consultant wants to deal with an angry client who has become enraged by an unexpected set of expensive recommendations.

In addition to setting the parameters for an assessment, the consultant will also attempt to determine the client's ongoing needs. Will they need ongoing consultation as they implement the recommendations? What about help with annual benchmarking? Or training for them and their employees?

Once all of this information has been gathered, the consultant will create a statement of work and provide it to the client for review. This statement may be very simple such as "*The consultant will conduct a comprehensive security assessment of the client's facility and as necessary will provide recommendations for improvement.*" Or, if the client has specific needs, the statement will reference those needs: e.g., "*The consultant will review the client's facility for compliance with The International Fire Code.*"

A note, the consultant should keep a keen eye out for any unethical requests from the client. For instance, a client may want the consultant to conduct an audit as a defense against pending legal claims. This could place the consultant under pressure to present the audit in terms that best advantage the client's legal case. The ethical consultant must never be afraid to walk away from the job if he feels he is being asked to act dishonestly. His reputation isn't worth the money, no matter how much the client is

willing to pay.

Additionally, an ethical consultant will never allow the client to write the report. Heavy-handed clients aren't worth keeping. A consultant's integrity dictates that though he will take into account the client's request for a specific scope of work; but, he will not allow the client to dictate the specific recommendations.

Section 9: The Assessment and Recommendations

Let's take a look at the strategies for putting together a great assessment.

The security assessment, also sometimes known as the security audit, is the process of going to the client's site and completing an assessment form or checklist of security conditions.

The wise consultant will prepare for this assessment ahead of time. For example, perhaps you have won a hotel client and will be conducting a security assessment at a hotel. Before going on site you will carefully review the aspects of hotel security and the hotel-related materials from your toolbox such as the example survey from the Hotel Security and Safety Committee that can be found in the resources section. You will then use this information to put together a checklist of assessment items and the strategies for finding out the needed information, e.g., which question to ask the client and his employees in order to get an honest and helpful response with the information you need to know. Now, once on site, you will know exactly what questions to ask and which items to inspect.

As you conduct your site visit, be through and take your time. And, go above and beyond.

For example, do you recall the example of Tom Blart from earlier in this course? He was perfectly positioned to make observations because he was the on-the-ground security officer. He wrote white papers on his site's security and practiced for the day when he would become a consultant. However, once he became a full-time consultant, he no longer had the on-the-ground viewpoint of an officer; but, that doesn't mean he is prevented from capturing this viewpoint. How will he get an on-the-ground perspective? As he conducts each assessment, he makes contact with the on-the-ground personnel, such as the security officers, and asks them open-ended questions that are designed to make them feel comfortable with explaining the site's security issue. This approach allows him to receive input from many sources and to produce meaningful recommendations.

As you interview the employees, don't give in to the temptation to rush through a bunch of yes or no questions. For example, when conducting an interview, don't ask "*Is the back door locked every night at 11pm?*" Instead ask open-ended questions that don't have an easy "*yes*" or "*no*" answer such as "*How often is the back door left unlocked after 11pm?*"

This will entice the employee to really think about her answer and she's more likely to provide vivid descriptions of instances when the door was left unlocked. Once she explains what happened, ask plenty of follow up questions and attempt to determine the circumstances that have led to this oversight. This will assist you in writing the meaningful recommendations that are designed to keep this type of mistake from recurring in the future.

Always create a photographic record of your findings. Remember our earlier reference to the hazardous materials that are stored too close to a public alleyway? This finding should be

documented with a series of photographs. These photos will validate your findings; just in case there's any future dispute, e.g., the employees who were storing the materials too closely to the back of the property realize their mistake, remedy the situation and then later attempt to claim that they never made the mistake in the first place.

Once you have concluded your site assessment you will return to your home or office and mark up your findings on an assessment form. You may use any standard word processing software to create this form or may choose to use an assessment software such as the risk assessment app offered by easysetgo.com.

With completed assessment in hand you are now ready to score your findings and draw up some recommendations.

How does this scoring work?

You will review your assessment and rank the findings of deficiency according to a consistent, easy-to-understand grading system.

Here's a hypothetical grading system: On a scale of one to five: One equals Insignificant Risk; Two equals Some Risk; Three equals Moderate Risk; Four equals Critical Risk; and, Five equals Catastrophic Risk.

Be prepared to explain your grading logic to the inquisitive client. "*You assigned a grade of four to the unsecured door but only a grade of one to the unprotected HVAC units. Why the difference?*"

These rankings will allow you to sort your recommendations in order by severity. You will list your most severe findings first and work down to the least severe.

Consider the following example of recommendations from a consultant's report for an apartment complex.

Absence of Security Policy and Procedures (4: Critical Risk)

Site personnel and security officers are unaware of any existing policies and procedures. Management believes the procedures exist but they are unable to locate them. Site management should develop a policies and procedures document and a security plan. This plan will provide written guidance for fire and storm response; post orders for the security officer; and, a residential behavior policy that can be consistently enforced by the officers.

Police, Fire and EMS Do Not Have Gate Code (4: Critical Risk)

Local public safety officials have not been provided with emergency access codes to the vehicle gate. This complicates their entry and extends their response time when responding to a call from a resident of the site. It's recommended for emergency gate codes to be created for local police, EMS and fire. The departments will place this code on file and their dispatcher will provide it to the responding units as needed.

Entry Door Framing Missing (3: Moderate Risk)

The exterior metal framing has been removed from the entry doors into units D, G and L; these doors are now vulnerable to manipulation from outside. Maintenance crews should install new framing.

Unauthorized Access (2: Some Risk)

The swinging vehicle access gates are easily breached by unauthorized visitors. Unauthorized visitors are frequently observed tailgating an authorized vehicle into the complex. Residents should be encouraged to report instances of tailgating.

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Security Personnel Lack Ongoing Training (2: Some Risk)

Security personnel are not participating in continuing education and do not receive ongoing training. Site management should consider enrolling each officer in The Security Officer Network's membership and training program at SecurityOfficerNetwork.com.

As you draft your recommendations, use caution when dealing with legal matters. Never describe your client's facility as out of compliance with law or give advice on how to come into compliance. You are not a lawyer so don't make legal judgements. Simply advise the client to consult the guidelines and to check with their legal council.

For example, let's revisit the instance of the hazardous materials that were stored too closely to the public alleyway.

Here's the wrong way to draft the hazardous material recommendation:

Code Violation (4: Critical Risk)

Employees are storing combustible materials against the back fence. This fence is located just five feet from the public alleyway and is thus in violation of Chapter 54 of the International Fire Code and city ordinance. Site management must come into compliance with code by either storing the materials 20 feet from the alleyway or by building a firewall that meets the specifications in Chapter 54 of the Fire Code.

Here's a better way:

Material Stored Next to Public Alleyway (4: Critical Risk)

Employees are storing combustible materials against the back fence. This fence is located approximately five feet from the public alleyway. Local code requires either 20 feet of separation or a firewall to exist between a public alleyway and the storage of corrosive materials. Site management should

consult Chapter 54 of the International Fire Code and legal counsel to ensure compliance.

Do you see the difference?

In the first example the consultant unnecessarily indicts his client for a code violation and then offers specific advice on coming into compliance with the code. In the second example, the consultant tells the client what he needs to know but he avoids accusing the client of a code violation and the appearance of offering legal advice.

As you write each recommendation, consult your potential recommendations document and cite applicable recommendations. Remember the suggestion to stash the ASIS International blog post into your potential recommendations document? These types of citations will give credibility to your report. No longer are the suggestions just yours but they are the suggestions of an industry-recognized authority.

Here's an example:

IT and Physical Security Siloed (3: Moderate Risk)

The Chief of Security indicates that on multiple occasions the visitor access gate codes have stopped working and the gate has remained in the open position. Security personnel do not have direct access to the IT contractors who maintain the gate authorization system. Site management should place the security officer into direct contact with each of the IT contractors. An October of 2021 post by ASIS International describes Cybersecurity and Physical Security as a best practice. This integrated relationship would assist in the timely mitigation of the gate access issue.

Once your recommendations have been written up, resist the temptation to immediately email them over to the client. Instead, wait a day or two; then,

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re-read the recommendations. This review process allows you to see the document with fresh eyes and you will likely revise several provisions.

As you re-read the document, keep an eye out for the opportunity to spice up the recommendations with a historical fact or two from your library of security industry material.

It's now time to share your hard work with the client.

This is best done in person. Schedule the in-person meeting and walk the client through a chronological description of first your assessment and then your recommendations. It's quite important to stay positive, even at sites where there are many deficiencies. Don't embarrass or belittle your client with statements by comparing them to other facilities that you have audited—unless they ask for the comparison—and emphasize the positive aspects of their operation.

As you review your recommendations, ensure that they do not create the appearance of a salesman who is trying to up-sell additional services. When recommending the creation of a security plan, policies and procedures or a training program, use great caution to avoid promoting your own services. If the client has an interest in using your services for these purposes, he will ask.

That's it for this section. At this point, you should have a good understanding of the process for conducting an assessment and writing recommendations.

As you become experienced in your niche you will develop in-depth processes for capturing just the right information and making great recommendations for your client.

In fact, if you are currently a security officer, as you have read this chapter, you have probably come up with many ideas for how to draw up an assessment form for your site.

Do it!

Right now, while you are inspired to build it. Just open up a blank word processing document or grab a notepad and start writing down the questions that would make a great assessment for your site.

And, do know that you are already creating your own work product. It's a work product that you may use for years into the future as you assist those who need consulting services.

Section 10: The Other Services

Your security assessment is a great tool for getting your foot in the door and soliciting the client for additional consulting opportunities. In an earlier section, we examined the basics of these services. Now, let's take a deeper look.

Creating Standard Operating Procedures and Security Planning

It's important to understand the difference between the security assessment document and security procedures documents: The assessment contains an audit of the site's security and makes recommendations for its improvement; the procedures are an ongoing set of rules and plans. The site uses these procedures, on a day-to-day basis, to guide their security operations.

The procedures will vary between sites: A multi-residential apartment complex needs a procedures document that's different from the procedures that are required at a data center. This diversity of need creates a neat opportunity for the security consultant who is prepared to assist a business owner with his specific circumstances.

Components of a security procedures document might include: a description of the chain of command, personnel policy, shift scheduling, post orders, emergency response plan of action, camera footage retention rules, use-of-force policy, key card access rules and much more.

Check the resources section for an example of a security procedures document.

In every security assessment that you conduct, determine if the site has a security procedures document. If they don't have one, then they need one and you should recommend that one be created. If the site already has a procedures document, how long has it been since it has been reviewed and if

needed, updated? Is the document still relevant to the site's needs? Do site personnel follow the procedures? Or have they been ignored and perhaps become irrelevant?

Creating and/or updating the procedures are an additional opportunity for you to provide a service to your client. As the client reviews your recommendations, be prepared for him to ask, "*Can you create a procedures document for me?*" or, "*Can you update our procedures?*"

As you create or update your client's procedures, consult your toolbox of sample procedure such as the example document in this course's resource section. Use these examples to customize a procedures document that meets your client's specific needs.

As you assemble the procedures, keep the following tips in mind.

Each procedure should be easily understood and simple to follow. Avoid the procedures that are hard to understand, are not practicable or are not enforceable. Remember, once the site's personnel get out of the habit of following some of the procedures then they become just another pointless document that has little relevance. When writing each rule, ask yourself, "*If I worked at this site, would I be able to follow these rules? Or, would I simply conclude that they are too confusing to figure out and just ignore them?*";

Ensure that there is a reason for each procedure. Don't drop in unnecessary procedures simply to pad or lengthen the document. There's nothing wrong with a small set of procedures. Site personnel will not enjoy reading through an array of unnecessary rules. A document that's full of the unnecessary is less likely to be read and subsequently not likely to be followed.

Interview the site employees who will be governed by the procedures. Just as you interviewed the site's employees when conducting the security assessment, you will also consult with them as you write or update their operating procedures. Get their input and use this input to tweak each proposed rule to reflect the reality of the site. Will the employees consistently follow your proposed procedures? If not, why not? Would they be unenforceable? What are some of the procedures that the employees would propose? Listen to their ideas and carefully consider their input. This is a much better approach than simply copying from the boilerplates in your toolbox without taking into account the views of those who are dealing with the procedures on a daily basis.

Tracking and Benchmarking

Even though a site has adopted the consultant's recommendations and has implemented security procedures, there's still an important role for the consultant to play: Regular tracking and benchmarking.

Here's how it works.

As you write the site's procedures, you will design an incident tracking mechanism. You will write a procedure that requires the site supervisor to track the number of incident reports and the type of report. Here's a simple example: at a retail plaza the supervisor must report the number of parking lot traffic accidents, vandalisms and retail thefts. These measures are referred to as Key Performance Indicators or KPI. Then, at some set interval such as once a month, you will review the KPI. Are the number of incidents rising? Then site procedures, such as patrol policy, might need to be adjusted, i.e., more patrols or better randomized patrols; or, staffing changes such as mixing shift times or bringing on additional officers may be needed. This tracking and benchmarking process allows site management to fine tune it's security procedures and to meet the demand of changing circumstances.

For KPI strategies and more examples of KPI and site metrics review the How to Manage a Security Guard Company book from The Security Officer Network.

Training

The client and/or the client's employees may not have the needed skills to adopt the recommendations or implement the procedures; this is where the consultant's training services become quite valuable.

Here are some examples:

As you conduct your security assessment you notice that the employees are storing combustible materials in non-compliant ways such as too closely to a public alleyway; in order to stop this practice, the client will pay you to conduct training for all newly-hired employees. In that training you will review the International Fire Code's hazmat sections and train the employees on the proper storage of these materials;

You have written a security procedures document for a retail plaza. The new procedures require the staff to categorize their incident reports according to standard KPI such as parking lot traffic accidents, vandalism and retail thefts. Once a month you will train the site's newest officers on how to complete their incident report forms and to properly categorize them so that they can be correctly measured by the benchmarking process; or

You performed a site assessment at an apartment complex. As you inspected the outer doors to the apartment buildings you noted several instances of missing protective door framing. Without this protective framing doors are easily forced and unauthorized visitors can enter into the buildings without a key card. You will train maintenance staff on how to spot these missing protective frames and help them find a vendor that can supply new frames at a reasonable

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price.

The above are just three simple examples of training; but, there are many opportunities. Basically, for each of your security assessment's recommendations, there's a potential training opportunity. As you review your recommendations with the client, for each recommendation, be prepared to offer training to the client and his employees, if requested.

General Consulting

Do you remember the strategy Tom Blart used to gain knowledge of the private security industry?

Even though he was just a segway-riding unarmed officer, he used the power of the internet to learn about all things security.

Once he's a consultant, he keeps reading, learning and keeping up with the evolving world of private security. From policy and politics to technology, the security world is rapidly changing and these changes are overwhelming to the business owner who needs security but does not have the capacity to keep up with everything he needs to know.

That's where the opportunity for general consulting comes in. As a well-read, knowledgeable, security aficionado you are the perfect candidate to provide general consulting services.

So, how do you get a general consulting contract?

Think of your security assessment as an application. As he reads your security recommendations, your client should think, "*Wow, these suggestions are so helpful, I need to retain this consultant full time.*"

This is your opportunity. Be prepared to offer your permanent consulting services for a retainer fee.

As your client's permanent security

consultant you will help him implement your assessment's recommendations, develop/update the security procedures, train his staff and make decisions such as: should I hire contract security or go with an in-house team; or, which technology should we use for our camera surveillance.

Here's another reason for the client to hire you for your general consulting services: In addition to your general knowledge of security, you will have developed a plethora of relationships with vendors and regulators.

Is there an issue with the city fire marshal's most recent inspection of the client's facility? You are perfectly positioned to assist on this matter. That's because you will have taken the time to introduce yourself to the key local officials, gotten to know them and earned their trust.

Perhaps one of the client's security officers has mistakenly allowed his state unarmed security license to lapse. You will call the state regulator and explain the mistake and work with them on bringing the officer back into compliance ASAP. The client doesn't have the time to build these relationships; but, you, as a consultant, will bring these relationships to the table.

Testing

It's the best out of all of the consultant services: offensive security, also known as penetration testing. This is the one aspect of consulting that allows the consultant to get out of the office and have some fun.

Essentially, the consultant physically attempts to breach the site's security. He accomplishes this task using techniques such as social engineering; the technique of getting access to a facility by tricking employees into giving access to an unauthorized person.

Or, the consultant may attempt to gain surreptitious access, such as locating

the blind spots in the client's physical security perimeter and breaching the perimeter.

In some cases, the test is simple, for example: parking in an unoccupied parking lot at night and timing the security officer's detection or response time. Or, simply conducting random drive by inspections to ensure the officer is awake and patrolling.

These tests are used to affirm or adjust the site's security procedures.

Also, a successful penetration attempt may be used by the client to justify the need for a larger security budget. An example of this use case is the Chief Security Officer at a large corporation who hires a pentest team to breach his facilities. He then uses their report and their recommendations in his budget request for the next fiscal year.

Additional Tips

Ok, so, by now you are excited about the whole security consulting endeavor and are thinking, "*this might be for me.*"

But, as with most things in life, you probably have some doubts. Perhaps you lack the confidence needed to reach out to clients, regulators and vendors.

Here are a couple of tips:

Join Toastmasters International or a similar organization: This is a must do for the officer who is hesitant to build relationships. These groups put their members through a well-constructed, positive, affirming program that's designed to assist with public speaking. These skills will help with all aspects of consulting from relationship building to training. In a few weekly meetings the dedicated participant will gain confidence in his speaking skills; he will improve his ability to think on his feet; learn to organize his spoken content into a logical flow—this is vital for those consultants who provide training—and he will be better positioned to approach

and converse with strangers. Many metro areas host numerous clubs such as these so you are pretty much guaranteed to find one that meets in your off duty time; and

Envision the worst: What's the worst that can happen? A potential client will rudely reject your services. That's not an issue for you; there are plenty of other potential clients. However, that client has just lost the opportunity to do business with the local security industry's hardest working and best prepared consultant—so it's their loss. Or, a harried government bureaucrat won't appreciate the fact that you reached out and introduced yourself to him. Once again, you will be fine. You have mentally prepared for this rejection and you can't help his lack of professionalism. That's on him, not you. With this positive mindset you will lose your fear of rejection and your confidence in your skills will continue to grow.

Section 11: The Extra Paycheck

In addition to the pay that you receive from your client, there's an opportunity to earn significant passive income from your referrals to third-party products and services. Let's review some of these pay-maximizing strategies.

Whenever you are out and around town take note of anything and everything security related: CCTV systems, security guard services, loss prevention equipment; notice everything.

Notice a new type of loss prevention system? Who is the provider and how does it work? Is it better than other loss prevention systems?

Or, maybe you see a new security patrol service's vehicle patrolling the parking lot of a retail plaza. This is an important observation. This new service might allow your client to migrate away from the big corporate security providers and support a local security officer business.

Your observations are important from the perspective of becoming a more knowledgeable, well-informed consultant and are potential money-making opportunities.

Keep a close eye out for new, emerging technologies; after all, it's your job to be on the cutting edge in terms of security technology. The rapidly evolving security technologies are one of the biggest reasons for why there's an ever-greater need for security consultants—like you.

The Local Vendors

It's never too early for you to create a spreadsheet and start tracking potential security products and service providers. Knowing the names of these providers and the nature of their products and work will become one of your important intellectual properties. Your future clients will depend on your guidance as they navigate the tricky world of who to hire for their alarm hardware, alarm monitoring, CCTV and video recording management system, access control and security officer staffing. Your spreadsheet will guide your recommendations as you direct your client through the maze of providers.

Use search engine queries, social media page searches and the phone book to find the providers for your spreadsheet. The phone book is especially helpful because it contains an organized categorizations system: a set of headings that will help you identify the different types of providers. This keeps you from missing an entire set of potential vendors. Just flip through the yellow pages and take note of each heading and then ask yourself, "*Is this type of business a potential provider of security-related services?*" If so, enter each of the businesses listed under that heading into your spreadsheet; then, search for this term online and supplement your spreadsheet listings with the online results.

Next, let's perform some deep research on each of the potential providers. Do they have an active social media presence? If so, follow them. Are their employees on LinkedIn? Using this research, attempt to determine their business organizational structure and the identity of the company's decision makers. Find their web site and carefully analyze their product offerings, pricing structure and if possible, identify some of their current and past clients.

With the benefit of this research you will have assembled an array of helpful guidance that will prepare you for your next step: visiting the provider. Tell them you are wanting to build a practice as a security consultant and ask them to demonstrate their products, describe their service and explain why they are the best provider for their client's needs

and budget. Can they disclose the identity of some of their clients? Would they mind if you contacted those clients to verify the quality of the product or service?

This research will allow you to compare them to their competitors and potentially advise your client, i.e., you have performed this research for a reason and you are now the city's best-informed consultant. However, that's not the only benefit. Some of these vendors likely have an affiliate or referral program. The program awards a commission for each customer you refer to them. Your participation in this program creates your extra, passive paycheck: a set of referral fees; and, over time, as these referrals pile up, they may provide you with more income than your direct compensation from your clients.

For example, consider the case of the security consultant who has built relationships with both a local alarm install and monitoring company and a private security patrol agency. That consultant is well positioned to recommend both of these services to his clients; and, he's likely to receive ongoing commissions from both of these firms so long as his clients continue to subscribe to their services. This creates an ongoing stream of passive income: income that will come in each month even if the consultant is on a month-long vacation.

In Tom Blart's example he received a consultant's retainer from the mom and pop car lots; however, he makes even more money in commission from the GPS tracking providers who sell to the car lots because of his referrals to their products. This latter income stream will stay in place even if the mom and pop lots stop paying Blart's retainer. This allows Blart to keep the mom and pop car lots' retainer fees to a responsible monthly amount that can be afforded by the small car lot.

Of course, never forget the importance of the ethical consultant's best practices.

Always inform your client of any referrals that you get because of their purchases. And, understand your own human nature. Humans are affected by money and it's very dangerous to become motivated by money. Many people will be tempted to recommend a product or service because of the referral and not because it is truly the best for their client's needs. Don't let this happen to you!

You can avoid this problem, in part, by doing great research. Find the products and services that really are the best for your clients. Lazy consultants won't do this research. They will simply refer to the products that pay them the best and leave it at that. These lazy consultants are doing a big disservice to their clients.

One more tip, here's a great way to impress your client: disclose the referral program, and then, if it's best for them, recommend a program that isn't paying a referral. The client will be very impressed upon realizing that you are forgoing a referral payment. This shows that you are really acting in their best interest.

Nationwide Affiliates

You are not limited to local product and service providers. You name the product and it probably has an affiliate program. The most famous of these is the Amazon affiliate program. When you sign up as an Amazon affiliate you receive a commission each time a product is purchased with your affiliate link. Because many security products are offered through Amazon this is perhaps the easiest method for receiving affiliate income. Simply direct your client to use your affiliate link when making their purchases.

Don't limit yourself to just the Amazon affiliate program. Many security product businesses may offer affiliate programs on their own—even if their products are available through Amazon. Don't hesitate to contact these businesses directly and ask them for details on their direct affiliate program. This allows them to

avoid going through Amazon and lets them sell directly to your client.

With the help of these programs your consulting business has taken yet another step towards profitability and success.

Section 12: The Client Acquisition

How do you achieve your first client? This is an in-depth topic and those who want to explore in more detail should read the book How to Get Clients For Your Private Security Agency from The Security Officer Network.

As a new consultant you face a barrier to entry: you don't have a track record of successful consulting jobs. Thus, to get those first few clients, you must innovate. You must entice your first clients by offering either a freemium product such as a free security assessment or an attention getter much like the complimentary vehicle theft report offered by Tom Blart to the car dealers.

Just as you have created a spreadsheet to track vendors, you will similarly track potential clients. You will search them out by phone book heading type—with a special focus on the niche for which you are best prepared to consult, e.g. Tom Blart and his targets of choice: mom and pop car lots. You will then supplement these listings with search engine queries and social media research. Once your list is populated you will deep dive research each potential client and attempt to locate the decision makers; LinkedIn is a great tool for this type of research.

You will then develop a report or other attention-getting product, will deliver the report to the decision maker, either online or in-person—in-person whenever possible—and use this to build the relationships that will lead to future business. Additionally, when first starting your agency, you may choose to offer free security assessments. These assessments will organically bring up additional opportunities such as training,

development of security procedures and more. Those who receive the report will become your first references who can attest to the quality of your work.

So, how can you afford to create and give away free assessments and reports? Remember, Blart didn't just quit his security job and open his consulting business; he first asked to be assigned to a second or third shift and then, during business hours, delivered free reports and built relationships.

Over time these relationships will transform into your agency's initial client base and that's what allows you to quit your security job and focus full time on consulting.

Even after getting enough clients to become a full-time consultant you should keep publishing your report, after all that's what you are known for. But, instead of giving away free security assessments, because you are a proven entity with an array of satisfied past customers, you will charge for them. Or, maybe, the freemium business model will have proven to be such a success at generating client leads that you will continue to provide the assessment for free as a lead generator for additional services.

The Attention Getter

In the Tom Blart example, Blart developed his attention getter: a quarterly vehicle theft report. This report allowed him to visit his targeted businesses four times per year. He got their attention with his free report because it was relevant to the businesses' security needs.The report's contents were easily assembled from his city government's open data portal and

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the report was really very helpful to the businesses in his target niche: mom and pop car lots.

Like Blart you need an attention getter that will give you a valid excuse to meet and talk to future clients.

Where do you get the content for your attention getter? Carefully review the data sets that are published by your local public safety agencies. To see an example of one of these open data portals, take a look at dallasopendata.com and click on "*Public Safety.*"

Is there a data set that's particularly relevant to your target niche? From serious crime, to vandalism, to police response time, business owners want to know what is going on around them and they will appreciate your information. And, even if you can't find a data set of relevance, don't hesitate to ask your local public safety agency if it's available. It may be something public safety officials are tracking but have not yet placed it online for everyone to access. Ask them to provide the data to you in a standardized format such as a csv file that you can easily import into a spreadsheet.

Drop the data into a spreadsheet and look for trends. Perhaps crime is increasing in a certain zip code or maybe it's taking the police longer to respond to non-emergency calls. These data are not just informative to the reader but they are also reasons for why the reader might need the services of a consultant and/or a security provider.

The lead generator doesn't need to be fancy. It can be a basic table of numbers that show the crime occurrences by zip code or some other jurisdictional boundary and the change in those numbers since the last report. You can add a page or two of narrative and recommendations such as, "*The increase in car thefts citywide should entice car owners to invest in GPS tracking technologies such as 'insert*

locally available recommended GPS products here.'"

If you're inclined to learn some spreadsheet magic—there are plenty of free, online video tutorials for learning how to use spreadsheets—you can quickly generate some charts and impress the client with graphical visualizations of your data.

Consider including data sets that demonstrate the need for security. Perhaps no other dataset better accomplishes this goal than the "*police response time*" dataset. Chances are, in your city, the police are falling farther and farther behind in their response time, are chasing calls and it's taking them much, much longer to respond to non-emergency and even emergency calls. Show this with some great graphics and your reader will quickly get the point: He needs security solutions.

Your attention getter should be designed to be recurring. A monthly or quarterly report will provide you an excuse to make repeated contacts at all of the targeted businesses on your list. Monthly is better, quarterly is acceptable.

Target the attention getter to the areas where it's the most relevant. Is a certain area experiencing a crime outbreak? Your report will show this and that makes it relevant to the reader. Your target might have been personally affected by the outbreak or even the slow police response time to their calls and because of your research you are in the right place at the right time.

The Icing on The Cake

Want to take the attention getter to the next level? Each time you release a new report, go to the impacted area such as the zip code that's experiencing the most increase in crime and film some footage with your phone.

Then write a headline that both describes the report's most important findings and grabs the attention of the

reader. Examples include, "*Car Thefts Rise in South Dallas*" or "*Police Response Times Slow in Southwest Dallas Police Division.*" Write and record audio as you read a few paragraphs describing the report's findings.

Then use a free movie editing software to merge the audio with your video footage. You will find plenty of free tutorials on the net. And, services such as YouTube Creator Studio offer free resources such as background music. Use these resources to add some professionalism to the footage.

Upload your footage onto Rumble, Odysee, YouTube and other social media. Grab a screenshot of the video and drop it into your printed report along with instructions on how to find your footage online. Now your report will carry some extra weight with the reader; he will realize that your report isn't just a printed product but has a semi-professional or even a professional multi-media aspect.

Finally, don't hesitate to send your report to local media entities and news reporters. These reporters are constantly under the gun to find meaningful local news and they will appreciate your report.

Find the reporters' contact information: go to their media company employer's website and look up their previous stories. They will sometimes list their email addresses alongside their stories. This is because they want the public to contact them with news tips.

When sending your report to a reporter, attach a brief summarization of its most notable findings. Don't make the reporter read the report to find out what is in it; they don't have time for that. They just need to know why it is important and what is the key takeaway from the report. For example, "*Dallas Police Calls Rose By 15% in August.*"

Also, whatever you do, always personalize the email with the reporter's name. A personalized email will get more attention than a random CC that goes to all of the media outlets. Reporters don't want to report on the same news as other reporters. They want a scope. So, once you build a relationship with a particular reporter, honor that relationship in your future efforts to get press. Go to that person with your story first, before emailing the story to other reporters.

See the resources section of this lesson for an example email to a reporter.

Your Statement of Exceptionalism

So, you've created a great attention getter and have been building relationships. Now, one of your targets has taken the bait and it's time to talk to them about your services.

Keep a statement of exceptionalism handy. What is your differentiating factor? What makes your services superior to any other similar services? Be prepared to complete this sentence: We are the agency that . . .

In Tom Blart's case, he is the consultant that specializes in GPS tracking. He's the guy who knows how to recover automobiles and there isn't anyone else in his city who knows more about how to use these systems.

Your Portfolio

Always keep a portfolio of your past work handy.

Maybe you haven't yet won your first client and don't have an example of past work. That's ok. Remember, even if you have never written up an actual assessment, you still have your example white papers that you have written up as a security officer.

These past examples of work will allow your target to visualize the quality of work that you will provide to him as his consultant.

Do keep in mind the importance of scrubbing identifying details from your sample reports. Future clients might see the name of past clients or security sites and they might fear that you will use their site's work product in your future solicitations to other businesses; this could compromise their security. They will understand and appreciate the fact that you scrubbed the former client's identity from the example report.

For additional client acquisition ideas such as these, see the book How to Get Clients For Your Private Security Agency from The Security Officer Network.

Section 13: The Conclusion

Here's your challenge: Using what you have learned in this course, start thinking like a consultant!

It doesn't matter if you ever actually become a consultant; thinking like a consultant is the first step towards achieving success in the private security industry. Once you see security through the eyes of a consultant, you become well-versed in the science of observation and this skill will serve you well throughout your security career and your life.

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Section 14: The Resources

The Unarmed Officer's Example White Paper

An example of the unarmed officer's work product as he writes up a document of observations and recommendations at his site.

https://www.thesecurityofficernetwork.com/doc/sc-samplewhitepaper

Security Assessments

Several examples of security assessment forms. Download these forms for your consultant toolbox.

Simple One Pager

https://www.thesecurityofficernetwork.com/doc/sc-assessment-simple

Educational, Multi-Section With Explainers (Multi-Residential)

https://www.thesecurityofficernetwork.com/doc/sc-assessment-complex

Hotel Security and Safety Committee Assessment

https://www.thesecurityofficernetwork.com/doc/sc-assessment-hotel

Security Procedures

US Government Boilerplate Procedures

This is a set of boilerplate procedures from the US Government. These are specifically designed for hydro energy production facilities; however, some of these provisions are germane at many different types of security sites.

https://www.thesecurityofficernetwork.com/doc/sc-sampleprocedures

Junior College Example Procedures

These are a set of security procedures from a junior college. Some of the provisions of this document are applicable to various security sites.

https://www.thesecurityofficernetwork.com/doc/sc-sampleprocedures-juniorcollege

Books

How to Get Clients For Your Private Security Agency
https://securityofficerhq.com/books/get-clients-security-agency

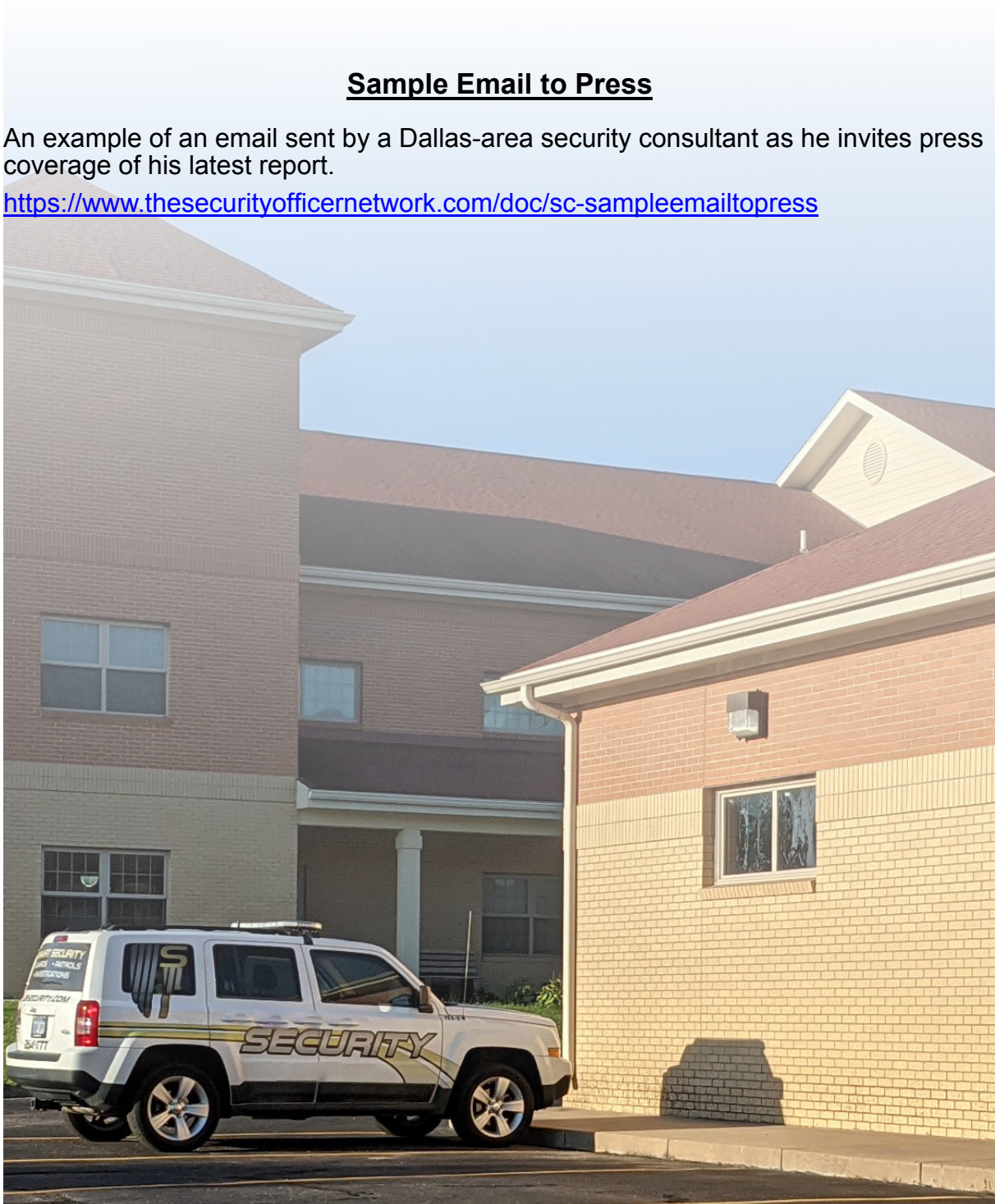How to Manage a Security Guard Company
https://securityofficerhq.com/manage-book/manage-security-guard-company

Sample Email to Press

An example of an email sent by a Dallas-area security consultant as he invites press coverage of his latest report.
https://www.thesecurityofficernetwork.com/doc/sc-sampleemailtopress

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End of Lesson