Hodson P.I.
Investigative Solutions

Texas Association of Licensed Investigators

Private Investigator Business & Marketing Masterclass

Building a Profitable, Ethical, and Scalable Investigations Firm

Justin D. Hodson, CPI

BEFORE WE START

Follow along on your own screen

Everything today is downloadable — today's slides and the full participant workbook. Scan it now and you won't need to photograph a single slide all day.

Slides + workbook

FOLLOW ME ON LINKEDIN

Two seconds now beats a business card you'll lose by Monday.

Here's your day

9:00 – 9:20

Six hours of instruction. Two breaks, a long lunch, and a written plan you leave with.

AM

Foundation and finding work

Session 1 — From investigator to business owner

Session 2 — Branding, marketing, networking and business development

Session 3 — Pricing, profitability and financial discipline

PM

Delivery and people

Session 4 — Client experience, operational systems and quality control

Session 5 — Hiring, training, leadership and company culture

END

Protecting it and growing it

Session 6 — Ethics, risk management and responsible growth

Session 7 — Scaling the firm, your 90-day action plan, Q&A and closing

Your workbook

9:00 – 9:20

Open it now. We use it in every session — and it is built to still be useful ninety days from now.

It follows the day — pages 3 to 25

A worksheet for every session. When a slide shows a page number, that is where we are working.

Five things you write, not read

Your firm in three years (p. 4), what an hour costs you (pp. 9 – 11), your case life cycle (p. 14), what you are still approving (p. 22), and the 90-day plan (pp. 24 – 25).

Checklists built to be reused

Intake, quality audit, onboarding, performance review, KPI scorecard. Photocopy them — they are not meant to be filled in once.

Six case studies — pages 27 to 29

Four we work in groups today. Two more to take back to your own team meeting.

RIGHT NOW Turn to page 2 and write down the one thing you want solved by 5:00.

Who's in the room?

Hands up. I'm going to use these answers all day, so be honest.

- Solo today — no employees, no subcontractors
- Subcontractors, but no employees
- At least one W-2 employee
- Five or more employees
- Ever fired a client
- In business under three years · over ten years
- Written pricing you could hand a client right now
- An org chart — even if it's three boxes

Why I'm asking

Not everyone in this room should want a bigger firm. Some of you have exactly the business you want, and today should make it more profitable and less fragile — not bigger.

The goal isn't the largest firm. It's the right firm, built on purpose.

What you leave with at 5:00

Clarity on the firm you're actually building

A written vision, a chosen business model, and an honest read on which one you want — not which one you assumed you were supposed to want.

A pricing method you can run on Monday

What an hour truly costs you, how to set rates and minimums against that number, and how to tell profitable work from busy work.

Systems that don't live in your head

Intake, case life cycle, quality control, and delegation — the four places a growing firm usually breaks.

A 90-day plan with a 72-hour first step

Three priorities, named owners, real deadlines, and one action you take before the end of the week.

01

Session One · 9:20 – 10:20

From Investigator to Business Owner

Principles 03 and 04 — Work ON the business · Act despite fear

The premise of the whole day

The second job is the one nobody taught you.

You were trained to find things out. You were never trained to run the company that does it. Today is the second job.

You'll be talking to each other

Four group discussions, two pair-shares, and five things you write on your own. Nothing you share has to be confidential.

Four group discussions

Sessions 2, 4, 5 and 6. Groups of four, nine to fourteen minutes each. The facts you need are printed in your workbook.

Five you do on your own

Your vision, your true cost per hour, your case life cycle, your delegation list, your 90-day plan. Silent, private, nobody collects them.

Nothing confidential — ever

No client names, no employee names, and nobody says what they charge. You decide what leaves your notebook.

WHY THIS IS HARD FOR US

We are trained to be covert. Building a firm asks you to be overt.

The through-line: nine principles

These aren't new. They're what I've actually used — and every session today sits on one or more of them.

01	Learn from mistakes	02	Learn from criticism	03	Work ON the business
04	Act despite fear	05	Be client-centric	06	Ask for help
07	Reinvest profits	08	Delegate to replace yourself	09	Control your growth

> *"Growth isn't just hustle. It's committed, responsible, ethical grind."*
>
> — JUSTIN HODSON

Two jobs, two skill sets

You were trained for the left column. You get paid for the right one.

The investigator

What you were trained to do

- Surveillance
- Statements and interviews
- Research and records
- Case management
- Report writing
- Evidence collection

The business owner

What the firm actually needs

- Sales
- Marketing
- Networking
- Hiring
- Finance
- Leadership

Working in it vs. working on it

Working IN it

Necessary — and it makes you the bottleneck

- Running the surveillance
- Writing the report
- Taking the intake call
- Reviewing the file yourself
- Every decision routed through you

Working ON it

What lets the firm outgrow you

- Systems and documentation
- Pricing and margin
- Hiring and training
- Referral relationships
- Deciding what the firm becomes

Most firms never grow past the founder

That's not a criticism. For many investigators it's a deliberate, reasonable choice — but it should be a choice.

4 years

FOUNDING TO FIRST HIRE

That's how long it took me. The first hire is the real turning point — and it's the one most people put off longest.

Two jobs

WHAT YOU'RE ACTUALLY DOING

Running cases and running a company, most days without admitting that the second one is a job at all.

Still

FEAR DOESN'T GO AWAY

It doesn't disappear at scale. You just get better at moving through it with better information.

> *"Even with 80 employees, I still get fear around decisions. Scared money doesn't make money."*
>
> — JUSTIN HODSON

Choose your model on purpose

There is no winner on this slide. There's only the one you're actually choosing — and whether you chose it or drifted into it.

A

Solo / lifestyle practice

You are the product. High rate, low overhead, total control.

Costs you: no leverage, no time off, and the business has little value without you in it.

B

Boutique firm

You plus a small team, deliberately capped. You still do some casework.

Costs you: you manage people and still carry a caseload — the hardest middle to hold.

C

Multi-investigator agency

You lead; others do the work. Scale, leverage, real enterprise value.

Costs you: you stop being an investigator. Payroll doesn't care how your month went.

Exercise: your firm in three years

Individual exercise · silent write, then pair

WORKBOOK P. 4

10 MINUTES

Write one sentence: the firm you want in three years.

- Which model — A, B, or C? Name it, don't hedge.
- How many people, including you? Employees, subcontractors, or neither.
- What is the firm known for? Be specific enough that it excludes something.
- What do you personally do all day in that firm?
- What has to be true about money for that firm to work?

Session 1 — the takeaway

The goal is not the biggest firm. It's the right firm, built on purpose.

You can only work ON the business in time you have deliberately protected. Everything after this session is what you do with that time.

NEXT — WHERE THE WORK COMES FROM

02

Session Two · 10:35 – 11:35

Branding, Marketing, Networking and Business Development

Principle 05 — Be client-centric · Principle 06 — Ask for help

The thing to hold onto

Marketing creates an expectation that operations has to fulfill.

Every promise you make in a pitch, on a website, or over lunch with a client becomes a debt somebody has to pay. For most of us, that somebody is you at 11 PM.

Brand is not your logo

Your brand is what somebody says about you when a colleague asks who they should use.

1 Reputation

What people already say about you. Built one case at a time, slowly, and damaged fast.

2 Expectation

What a prospect thinks will happen when they hire you. Set by everything you publish and say.

3 Delivery

What actually happens. When this doesn't match expectation, marketing has hurt you, not helped.

4 Referral

The channel that compounds most reliably in this profession. It is the output of the first three, not a substitute for them.

> *"If you see somebody successful, embrace them. One of the biggest things hurting our profession is rough competition and talking badly about each other."*
>
> — JUSTIN HODSON

Where the work actually comes from

Two different rooms. Most investigators only ever show up in the first one.

Where you go

Your profession — peers and standards

- TALI — this conference, and TILT for people newer than you
- National investigator bodies
- Investigator conferences and training
- Online PI communities
- Peers, subcontracting, and referrals when you're conflicted out

Where your clients go

Their profession — where their CLE budget goes

- Texas Association of Defense Counsel · TADC
- Texas Criminal Defense Lawyers Association · TCDLA
- Texas Trial Lawyers Association · TTLA
- Insurance Council of Texas — property and casualty carriers
- Paralegal Division, State Bar of Texas
- Texas Apartment Association · ASIS chapters · HRSouthwest

They will search for you

Before anyone calls you, they have already looked you up. The only question is whether you wrote what they found.

A website you control

Not just a directory listing or a social profile — somewhere the story is yours.

Identical details everywhere

Name, phone, license number and address consistent in every place they'll look.

Search presence, narrowed

For the work you actually want — not every service you could technically perform.

LinkedIn, not TikTok

Attorneys, paralegals, adjusters and HR directors are on LinkedIn. Almost none of your clients are on TikTok.

What you publish sets expectation

Never publish a promise your operations can't keep. Marketing writes the check.

FOLLOW ME ON LINKEDIN

That one's mine. Scan it, look at it for ten seconds, then go look at your own.

What to post — and what never to post

The first column is marketing. The second column is your license.

Worth your time

In the order they actually pay

- Google Business Profile — claimed, current, and carrying your reviews
- LinkedIn, because that is where the people who hire you are
- One short email a quarter to your referral list
- A page for each service you want more of
- Answering questions where your clients already are

Never — not once, not ever

All of it is discoverable, all of it is deposable

- Case content of any kind, open or closed
- Unredacted, Surveillance stills, video, or "gotcha" clips
- Anything that identifies a client, a subject, or a matter
- Geotagged photos of where you were working
- Commentary on a live case — yours or anybody else's
- Anything you would not want read back to you under oath

Case study: the phone rings, the bank account doesn't

Hypothetical case study · groups of four

WORKBOOK P. 27

13 MINUTES

A firm triples its inquiries and its profit goes down.

- A four-investigator firm spends heavily on search ads and a lead service. Inquiries go from 8 a month to 25.
- Most callers are individuals with domestic matters and small budgets. The owner personally fields every call.
- Two attorney clients who used to call directly now go through the same intake queue and wait.
- Discuss: what is actually broken here — the campaign, the intake, or the pricing?
- Discuss: what would you measure to know? And what would you stop doing on Monday?

Who's a good client for you?

Nothing was wrong with that firm's marketing. What was missing was the ninety seconds between the phone ringing and saying yes.

Qualify in ninety seconds

Six questions, asked on the first call

- Can they name a budget out loud?
- Have they hired an investigator before?
- Do they understand what a negative result looks like?
- Are they the person who actually decides?
- Will they pay a retainer before work starts?
- Is this repeatable work, or one call?

Decline well — it comes back

The no they remember is the one that was useful

- Say no the same day. A slow no costs them more than a fast one
- Name the reason: scope, budget, conflict, or fit
- Refer it on where you can — that is the part they repeat
- Decline the engagement, never the person
- Write down what you turned away, and why

Session 2 — the takeaway

Marketing gets you the call. Everything else decides whether you wanted it.

Go where your clients already are, control what they find when they look you up, and never promise something operations can't deliver.

NEXT — WHAT AN HOUR ACTUALLY COSTS YOU

03

Session Three · 11:35 – 12:15

Pricing, Profitability and Financial Discipline

Principle 07 — Reinvest profits · Principle 04 — Act despite fear

Your billable hours are not your working hours

This is where most firms lose money without ever seeing it happen.

Paid

WHAT THE CLIENT IS INVOICED

The hours that appear on the invoice. This is the only number most firms track — and it's the least useful one on its own.

Worked

WHAT THE JOB ACTUALLY TOOK

Travel, pre-surveillance, set-up, report writing, the callback, the follow-up email at 9 PM.

Carried

WHAT THE FIRM PAYS FOR REGARDLESS

Insurance, vehicles, software, licensing, equipment, the phone that rings when nobody is billing.

> *"A lot of clients don't understand the hours that go into surveillance, so you have to be more specific with them."*
>
> — JUSTIN HODSON

Build the number from the bottom up

Four steps. Do it once properly and you'll never guess at a rate again.

1

Total your real annual cost

Everything the firm spends in a year, including what you should be paying yourself. Not what you take — what the role is worth.

2

Divide by realistic billable hours

Not 2,080. Your honest utilization. This gives you the floor: what one billable hour costs you to produce.

3

Add the margin you need

Margin is what buys the next investigator's first six months before they bill anything. No margin, no next hire.

4

Set minimums and test the rate

A four-hour minimum, a travel policy, a cancellation policy. Then quote it out loud and see what happens.

Exercise: what does your hour cost?

Individual exercise · no numbers said out loud

WORKBOOK P. 10

13 MINUTES

Work your own true cost per billable hour.

- Use the hypothetical firm in the workbook, or your own numbers — your choice, nobody will ask which.
- Annual cost of running the business, including a fair salary for the work you personally do.
- Your honest billable hours — not the hours you work, the hours a client pays for.
- Divide. That's your floor. Write it down. Circle it.
- Now compare it to what you charged on your last three engagements.

Session 3 — the takeaway

Not all revenue is good revenue.

Work that doesn't cover its true cost isn't a client relationship — it's a subsidy you're paying for the privilege of being busy. Profit is what funds people, training, and the next five years.

LUNCH — 90 MINUTES · BACK AT 1:45

04

Session Four · 1:45 – 2:35

Client Experience, Operational Systems and Quality Control

Principle 05 — Be client-centric · Principle 03 — Work ON the business

Case study: the complaint that wasn't about the work

Hypothetical case study · groups of four

WORKBOOK P. 27

9 MINUTES

Clean surveillance. Solid report. Furious client.

- A firm works a nine-day assignment for a repeat client. The work is competent and the report is thorough.
- Nothing was found that supported the client's theory — a legitimate negative result, honestly reached.
- The client hears nothing for nine days, then receives a full report and an invoice on the same day.
- The client tells a colleague the firm 'ran up the bill and found nothing.'
- Discuss: what would have changed this outcome, and what would it have cost the firm to do it?

The two C's

Being client-centric isn't service theatre. It's these two things, consistently.

Candor

Say the true thing early, even when it costs you

- Honest about your team's fit before you take the case
- If it's outside your scope, say so — and refer it
- Educate on real cost, real time, real likelihood
- Deliver bad news yourself, and early
- Never let an invoice be the first surprise

Compliance

Know the rules for the firm you actually are

- Licensing and the rules that apply at your size
- Federal statutes that govern the work
- Written contracts and scope, every engagement
- Keep an attorney before you need one
- Texas specifics: confirm with Texas counsel

The case life cycle

Six stages. Every one of them is a place a client can be surprised — which means every one needs a rule.

1 Intake

Who they are, what they need, whether you should take it, and what it will cost.

2 Assignment

Who is doing it, what they've been told, and what they're authorized to decide.

3 Fieldwork

The work — plus a standing rule for when the client hears from you during it.

4 Review

Nobody's first draft reaches a client. Another reader, or you and a written checklist the next morning.

5 Report

Delivered when promised, in the format promised, with the invoice explained.

6 Close

Confirm satisfaction, capture the referral source, and file what you learned.

The communication rule

Everything before this slide was why. This is the how — and it is the cheapest fix in the whole day.

1

Within four hours

Confirm scope, what it will cost, and who they will hear from. Before anyone goes to the field.

2

Day two, then on a rhythm

A short note whether or not there is anything to report. Silence is never neutral — the client fills it in themselves.

3

The moment anything moves

Scope, budget, timeline. Before you spend the money, not on the invoice afterward.

4

Before the report, not with it

A negative result is a phone call first. Same result, completely different meaning.

5

With the invoice

One sentence explaining what they are paying for. Nobody should ever meet a number cold.

> *"Nothing observed today. The vehicle stayed at the residence from 7 to 3, I'm back on it Thursday, and I'll call you Friday either way."*
>
> SUGGESTED LANGUAGE — STEAL IT, CHANGE THE NOUNS

If it only exists in your head, you don't have a process

You have a habit. Habits don't survive delegation, volume, or a bad week.

Written before delegated

You cannot hand over what exists only in your memory.

Nobody's first draft goes out

Another reader, a cold read the next morning against a written checklist, or a swap with a peer. Solo changes the method, not the rule.

Audit on a schedule

A sample of closed files, on a calendar — not when you happen to feel uneasy.

Leads own quality in their area

Not the owner, personally, forever. That doesn't survive the next ten cases.

Training plus fail-safe

Training says what good looks like. The audit tells you whether it's happening.

Fix the process, not the file

The file is one client. The process is every client after them.

Session 4 — the takeaway

A client forgives a disappointing result far more easily than silence.

Communication is not the soft part of this business. It is the part that decides whether good investigative work turns into a relationship or a complaint.

NEXT — THE PEOPLE WHO DO THE WORK

05

Session Five · 2:35 – 3:15

Hiring, Training, Leadership and Company Culture

Principle 08 — Delegate to replace yourself · Principle 07 — Reinvest profits

Employees, subcontractors, vendors — everyone who does the work in your name

The people who do the work

You do not need employees for this session to apply. Every firm in this room already has people working in its name.

Employees

You control the standard, the training and the schedule — and you carry the payroll, the taxes and the legal obligations whether the month was good or not.

Subcontractors

Flexible capacity, no payroll. But their licensing, their conduct and their report quality are all your exposure.

Vendors and services

Bookkeeping, transcription, scheduling, database work. Usually the first thing a solo hands over, and usually the cheapest hour you will ever buy back.

THE PART PEOPLE FORGET

Your client hired you. They will never distinguish you from your subcontractor.

Roles before people

An org chart isn't proof you got big. It's a list of the hats — and if you're solo, you are wearing every one of them today.

01	Intake and scheduling
02	Fieldwork
03	Review and quality control
04	Reporting and delivery
05	Billing and collections
06	Business development

WHO OWNS EACH BOX IN YOUR FIRM TODAY?

You, someone you pay, or nobody. "Nobody" is where the complaints come from — and the second hire is usually administrative, not another investigator.

What a hire actually costs before it earns

The salary is the part everyone budgets for. It's not the part that surprises them — and the same unbilled hours apply to bringing a new investigator up to your standard.

$15–20K

INVESTED PER NEW INVESTIGATOR

What Hodson P.I. spends before a new investigator generates income. Shadowing, training, supervision, and the senior person's unbilled hours.

~50%

LABOR, AT MY FIRM

At Hodson P.I. labor runs about half of cost. Yours will differ — the point is that people, not equipment, are the cost structure in this business.

Then audit

TRAINING WITHOUT A FAIL-SAFE

Training tells them what good looks like. The audit tells you whether it's actually happening. Do both or don't bother.

How hiring goes wrong

Rarely because the résumé was bad. Usually because of what wasn't defined before the search started — and every one of these applies to picking a subcontractor.

Vague job description

You can't hire, train, or hold anyone to a standard you never wrote down.

You didn't verify it yourself

The license, the history, the references. Under time pressure the need to fill the seat quietly overrules the check.

Great in the field, can't write

The most common investigative hire failure there is, and the one almost nobody screens for.

Onboarding neglected

Without it, a good hire looks identical to a bad hire for ninety days.

Unstructured interviews

Every candidate measured against a different, unwritten standard.

The red flag you already saw

Ignored, because you needed somebody in the field on Monday.

Case study: the productive problem

Hypothetical case study · groups of four

WORKBOOK P. 28

12 MINUTES

Your highest-billing investigator is also your biggest problem.

- He bills more hours than anyone else in the firm and has done for two years running.
- His reports come back from review with errors. He resents the review and says so, loudly.
- Two clients have called about his tone. One junior investigator has quietly asked not to be scheduled with him.
- Discuss: what is he actually costing the firm, in numbers you could estimate?
- Discuss: what did the firm fail to do that allowed this to run for two years?
- No employees? Read him as the subcontractor you use most. Nothing about the answer changes.

Accountability and appreciation are not opposites

People can be held to a real standard and feel genuinely valued. Most firms manage one or the other.

Accountability

The standard is written and known in advance

- A written description of what good performance is
- Regular review against that standard, not vibes
- Quality audits that apply to everyone, including subs
- Problems named early and directly
- Consequences that are consistent

Appreciation

Specific, frequent, and not only financial

- Peer recognition — at Hodson P.I., Bonus.ly 'Tacos'
- Monthly team events; regular paid lunches
- Employee of the Month and of the Year
- For subs: a clear brief, prompt payment, and repeat work
- Say specifically what they did well, not just 'good job'

Session 5 — the takeaway

Your people should know exactly what good looks like.

If they don't, that isn't their failure. Training is a reinvestment, not an overhead — and a standard nobody wrote down was never really a standard.

BREAK — 15 MINUTES · BACK AT 3:30

06

Session Six · 3:30 – 4:05

Ethics, Risk Management and Responsible Growth

Principle 09 — Control your growth · Principle 02 — Learn from criticism

Three different questions

People collapse these into one, and that's where firms get into trouble.

1

Can I?

The legal question. Statute, licensing rules, and contract. Not a matter of opinion — and not one to guess at. This is where counsel earns their fee.

2

Should I?

The ethical question. Legal and wrong is a real category. Protects the client, the investigator, the license, the firm, and the profession.

3

Do I want to?

The business question. Some work clears both tests above and is still bad for your firm — wrong client, wrong margin, wrong exposure.

> *"It's a litigious world."*
>
> — JUSTIN HODSON

"Can I?" — the rules that decide it

You do not need to be a lawyer. You do need to know which of these is in the room before you take the case.

GLBA

Financial records and how they are obtained. Pretexting for financial information is where this one bites.

DPPA

Motor vehicle records — who may obtain them, and for which permissible purposes.

FCRA

Background work used for employment, tenancy or credit. The one that catches investigators who never thought they were a consumer reporting agency.

ECPA and wiretap law

Interception and recording of communications. Federal and state rules both apply, and they are not the same rules.

Texas Occupations Code, Ch. 1702

The law that defines an investigations company and licenses you. Section 1702.104 lists the activities that put you inside it.

Recording and tracking, in Texas

Consent to record, and placing a tracking device. Both are fact-specific and both end careers when guessed at.

These are questions for counsel, not answers from this stage.

Layers of protection

Not one policy. Several — for the company, the employees, the future, and the family.

Insurance layers

Errors & Omissions
General Liability
Directors & Officers
Cyber coverage
Bonded and fully insured

Clients ask about this constantly, and some now require it.

Contract and scope

Written engagement terms every time
Scope defined before work starts
A change process when scope moves
Cancellation and travel policies

The handshake engagement is the one that goes wrong.

Data and people

How client data is stored and destroyed
Who has access to what
Subcontractor conduct is your exposure
Licensing current for every person in the field

Destruction schedule, not just a storage policy.

Exercise: the client asks for something you shouldn't do

Hypothetical only · no real matters, no names · written vote

WORKBOOK P. 28

14 MINUTES

A good client asks you to do it a way you know you shouldn't.

- One of your three largest clients sends an assignment with an unusual instruction attached.
- The instruction would get the result faster and cheaper. You are confident it crosses a line.
- The requester is not a lawyer and does not appear to realize what they're asking for.
- Apply the three questions to it: can I, should I, do I want to?
- The hard part: this account is worth real money. What does the right answer cost you?
- Vote in the box on p. 28 — take it, decline it, or counter-offer. Nobody's hand goes up.

Session 6 — the takeaway

Reputation takes years to build and one decision to damage.

Ethical conduct isn't the constraint on the business. It protects the client, the investigator, the license, the company, and the profession — in that order, all at once.

NEXT — WHAT YOU DO WITH ALL OF THIS

07

Session Seven · 4:05 – 5:00

Scaling the Firm, Your 90-Day Action Plan, Q&A and Closing

Principle 08 — Delegate to replace yourself · Principle 09 — Control your growth

Growth magnifies what's already there

A small firm with a communication gap has an annoyed client. The same firm at four times the size has a reputation.

What growth magnifies

Both directions, at the same rate

- A strong training system → consistent quality at scale
- A weak one → the same error, repeated everywhere
- Clear pricing → margin that compounds
- Unclear pricing → losses that compound
- Documented process → new hires productive faster

Build before the volume

Systems first, then scale

- Written process before the first subcontractor, not the second hire
- Review before you stop reading every report
- Real margin before payroll depends on it
- Insurance and contracts before the exposure
- Audits before you can't personally see the work

Delegate outcomes, not tasks

Handing over a task and keeping the decision is not delegation. It's just more email.

1

Identify the task

Repetitive, time-consuming, or lower priority — but still essential. Start where the volume is, not where the drama is.

2

Choose the person

Match to skill and current workload, or to the potential to develop it. The wrong person makes delegation look like the problem.

3

Define it clearly

The outcome, the deadline, the standard, and the decisions they're allowed to make without you. Especially that last one.

4

Evaluate and adjust

Review the process, not just the output. Ask them how it could work better — then actually change it.

Exercise: what are you still approving?

Individual exercise, then pair · no names required

WORKBOOK P. 22

10 MINUTES

List what only you can do. Then be honest about it.

- Write five things in your business that currently require you personally.
- Beside each: is it the task that needs you, or just the decision?
- Circle the one that costs you the most time for the least value.
- Who could own the outcome — an employee, a contractor, a service, or software?
- What would have to be true for you to hand it over? That's your real constraint.

Write the plan

Written commitment · yours to keep, nobody collects it

WORKBOOK PP. 24 – 25

17 MINUTES

Three priorities. Real dates. One action this week.

- Three business priorities for the next 90 days — three, not seven.
- The specific actions under each, and who is responsible for them by name.
- What each one needs: money, time, a person, a tool, or advice.
- A completion date, and how you'll know it worked — a number or a visible result.
- The obstacle most likely to stop you, named honestly.
- The first action you take within 72 hours. Specific enough that someone else could tell whether you did it.

Questions

Anything from today — or anything about your own firm you'd rather ask out loud than not ask at all.

- Ask about your own situation — you don't have to name a client, an employee, or a number
- If it's a legal, tax, or employment question, I'll tell you it belongs with a Texas professional
- On pricing I'll answer method, not numbers — what to charge stays out of an association room
- If we run out of time, find me afterward — I'll stay

The closing challenge

Build a firm that is profitable, respected, ethical, and built the way you actually chose.

Not the biggest firm, and not the one you drifted into. The right one — priced honestly, run on systems, staffed by people who know what good looks like, protected by the line you won't cross.

GROWTH ISN'T JUST HUSTLE. IT'S COMMITTED, RESPONSIBLE, ETHICAL GRIND

Hodson P.I.
Investigative Solutions

Thank you

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SCAN FOR THE SLIDES

Same link as the one on slide two.

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