

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

What are you thankful for so far in 2024?

Overall, our members are thankful for health, family, professional support, community connections, business success, mentorship, employment flexibility, and opportunities for personal and professional growth.

1. **Health and Family:** Members are grateful for our continued health and time with family and the value this has for us as we age, and witness others' struggles to balance this at times.
2. **Professional Guidance:** Members are thankful for the validation and support we receive from friends and family in our journey towards self-employment.
3. **Community Support:** There is appreciation for being part of a supportive community that encourages sharing ideas and learning from failures.
4. **Business Success:** Positive client responses to a unique business model are a source of gratitude.
5. **New Hobbies and Connections:** Members are grateful for the freedom to discover new hobbies and make connections in a new area, as well as professional opportunities and to do that without needing the approval of someone else.
6. **Networking and Referrals:** Members value our network of former peers, which supports our new ventures in consulting and business.
7. **Mentorship:** The mentorship received from various individuals, which provides guidance and encouragement, especially during challenging times.
8. **Employment and Flexibility:** Gratitude is expressed for gainful employment, the flexibility of remote work, and a flexible work schedule.
9. **First Client:** One person is thankful for acquiring their first paying client.
10. **Learning Opportunities:** Appreciation is shown for learning opportunities and finding a niche, which includes the motivation to write a book.

What challenges are you facing right now? Where do you feel stuck?

Some of our challenges include the demanding nature of starting and managing a business, client acquisition, time management, marketing, maintaining product relevance, role clarity, work-from-home structuring, overextending in training, finding a niche, sales skills, economic constraints, and managing the underlying fear and uncertainty of being largely on your own.

1. **Starting and Managing a Business:** The hard work involved in starting up and running a business is a significant challenge.

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

2. **Client Acquisition:** Finding clients and convincing prospects of the value they offer, especially against established big-name consulting groups, is difficult.
3. **Time Constraints:** Time management and finding the time for marketing and sales activities are ongoing issues.
4. **Marketing and Survival:** Marketing products and ensuring survival amidst changing business environments. Keeping products relevant and integrating AI solutions.
5. **Role Clarity and Focus:** Being pulled in multiple directions, struggling to differentiate our role from the role of collaborators and other project team members in the organization and making a meaningful impact.
6. **Work-from-Home Structure:** Creating a structured workday from home and integrating technology and virtual learning effectively.
7. **Sales and Marketing Efforts:** General difficulties in getting more customers and effective sales and marketing strategies are highlighted.
8. **Avoiding "Order Taking"** - Many of us have been in positions where we are provided with both the problem and the solution - rather than letting us, as experts, create the solution part. This can lead to taking on training solution requests despite personal disinterest or believing (*in some cases knowing*) there is a better solution. Many of us have a vast array of professional experience, education, and certifications. However, we struggle with spreading ourselves too thin and taking an "order" rather than creating a better solution in collaboration with our client. Many clients have little time for the collaboration part. However, that collaboration is what creates the most successful solutions and resolutions to issues they are facing.
9. **Finding a Niche:** The need to narrow down offerings and find a specific niche to build a deeper, more focused expertise is a major challenge.
10. **Sales Skills:** The lack of sales skills and the need to create compelling offerings that attract clients without excessive marketing effort is noted.
11. **Economic Challenges:** Convincing companies to invest in our services during times of budget difficulties is a significant hurdle.
12. **Fear & Uncertainty:** Underlying many of these challenges is a sense of fear, whether it's fear of failure, fear of not finding clients, or fear of not being able to sustain the business.

Some additional challenges people are facing include:

1. **Aging and Friends' Struggles:** Grappling with the realities of aging and witnessing the health and life struggles of friends and colleagues, which brings a new perspective on life.
2. **Self-Employment Uncertainty:** Facing uncertainty and self-doubt about the decision to pursue self-employment versus returning to a corporate job. We are struggling with whether we are on the right path.

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

3. **New Area Adjustment:** Establishing new hobbies and social connections.
4. **Starting a New Business:** After retirement or leaving a long-time position, embarking on a new career in consulting and executive coaching, relying heavily on her network for referrals, which may pose a challenge if these connections do not yield consistent opportunities.
5. **Mentorship Dependence:** When our group members are heavily reliant on mentorship from others for guidance and support in their business journey, that can be a source of anxiety. What would happen if those mentors were to withdraw their support? Business owners should try and avoid being overly dependent on external validation – however, that is a struggle.
6. **Finding Clients:** The challenge of acquiring new clients and maintaining a steady flow of business is implied, particularly for those who are new to self-employment or consulting.
7. **Balancing Work and Life:** Although gainful employment and flexibility are appreciated, balancing work and personal life, especially in remote work settings, can be challenging.
8. **Book Writing and Niche Finding:** One person is in the process of finding their niche and topic for a book, which can be daunting and involve a lot of trial and error.

What are you learning?

Our members are learning about new marketing tools and strategies, experiential and generational learning, ROI measurement, continuous learning and its application, company positioning, SCRUM methodology, mental stimulation techniques, and the importance of self-compassion and personal growth.

1. **New Tools for Business and Marketing:** Learning how to use new tools such as Canva to market the business.
2. **Experiential Learning in eLearning:** Bringing the principles of experiential learning into the eLearning environment.
3. **Marketing and Engagement:** Learning how to engage with others to market and sell products, and understanding the benefits of these products, particularly in team settings.
4. **ROI Measurement:** Learning how to measure return on investment (ROI) and collect data to demonstrate the impact of our work, especially in an engineering context. This includes conducting pre-assessments to gather information about learners.
5. **Generational Science:** Learning about generational science, specifically how five generations work together, interact, and engage differently. There's a focus on understanding the lack of content in this space.

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

6. **Continuous Learning and Application:** Absorbing a vast amount of knowledge from books and certifications (e.g., [Maxwell certification](#)). There is a need to move from learning to applying the knowledge using the 70-20-10 model, where the participants are currently focused on knowledge acquisition (10%); social learning (20%); and practical application (70%).
7. **Marketing Positioning:** Learning how to effectively position our companies from a marketing perspective.
8. **SCRUM Certification:** Gaining knowledge and skills through SCRUM certification and LEAN Project Management methods.
9. **Mental Stimulation:** Learning to keep the brain active to avoid "powering down" in the evenings.
10. **Self-Compassion and Evolution:** Understanding that personal capacity for evolution is tied to compassion and self-awareness.

What is one goal you want to achieve by the end of this year?

Member goals for the year include selling leadership series, meeting revenue targets, gaining new clients, developing and marketing coaching programs, creating new job roles, enhancing instructional design skills, defining business niches, focusing on business growth strategies, publishing a book, journaling, and booking events.

1. **Leadership Series Sales:** Sell five convergent Leadership series.
2. **Revenue Goals:** Meet or exceed the revenue goal from 2022.
3. **New Clients:** Acquire five new clients by the end of the year.
4. **Team Coaching Program:** Create and market a team coaching program, moving from individual to team and collaborative coaching.
5. **Culture and Experience Role:** Work with a manager to create and define the role of Culture and Experience Manager, clarifying the responsibilities and expectations.
6. **Instructional Design Skills:** Learn how to design and redesign content for hybrid or blended environments and gain proficiency in using technical tools for instructional design.
7. **Define Niche and Target Audience:** Identify and define a niche, ideal product offerings, and target audience. Focus on understanding who the ideal client is and how to serve them effectively.
8. **Business Development:** Work through activities in ["The Boutique" by Greg Alexander](#) to start, scale, or grow the business.
9. **Publishing:** Publish a book.
10. **Personal Development:** Journal more frequently.
11. **Event Booking and Client Acquisition:** Book two more events and gain two more clients.

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

How can this group support you?

The C&E SIG can support its members through facilitating networking for business development, bridging gaps between consultants and the organization, providing career development and mentorship, sharing resources for instructional design, fostering feedback and collaboration, and promoting a supportive community environment for growth and learning (i.e., skill development, marketing and sales support, business growth strategies, emotional support, practical vs. theoretical, events and workshops, and technological integration).

1. **Skill Development and Learning:**

- **Workshops and Training:** Organize workshops on using new tools like Canva, instructional design for hybrid environments, and ROI measurement techniques. Provide support and advice on intentional culture building and change management in organizational settings.
- **Knowledge Sharing:** Facilitate sessions where members share insights on generational science and marketing strategies.
- **Instructional Design and Course Revision/Maintenance:**
 - Share resources and best practices for updating instructional design methodologies.
 - Create or share tools like virtual/in-person checklists for designing courses for diverse, non-connected groups.

2. **Networking and Connections:**

- **Mentorship Programs:**
 - Pair less experienced members with seasoned mentors to provide guidance on niche definition, client acquisition, and business growth.
 - Offer career path guidance and mentorship, especially for newcomers like Taylor who are navigating new roles.
- **Networking Events:**
 - Host regular networking events.
 - Help members find new clients and business opportunities.
 - Provide guidance on relevant organizations in the KC market for effective business development.
 - Foster connections between ATD members and consultants/entrepreneurs within the chapter to understand needs and foster collaboration.

3. **Marketing and Sales Support:**

- **Collaborative Marketing Initiatives:** Develop joint marketing campaigns to increase visibility and credibility, especially for new products and services like team coaching programs.

Consultant & Entrepreneur Special Interest Group (SIG)

June 13, 2023

Facilitator: Shawn Foley

- **Sales Training:** Offer training sessions focused on improving sales techniques/strategies for members who need to enhance sales skills.
- 4. **Business Growth and Development:**
 - **Goal Setting and Accountability:** Create accountability groups where members can set goals, track progress, & support each other to achieve.
 - **Resource Sharing:** Share useful resources like "The Boutique" book and other relevant materials to help with business development and scaling.
- 5. **Emotional and Moral Support:**
 - **Encouragement and Motivation:** Provide a platform for members to share their successes and challenges, offering encouragement and motivation during difficult times.
 - **Safe Space for Sharing:** Ensure the group is a safe space for members to discuss fears and uncertainties without judgment.
- 6. **Practical Application and Feedback:**
 - **Peer Reviews:** Arrange sessions where members can present their work (*e.g., marketing materials, content designs*) and receive feedback.
 - **Application of Knowledge:** Encourage members to apply what they learn through group projects or collaborative ventures.
 - **Feedback and Collaboration:**
 - Facilitate opportunities for members to receive feedback on content and instructional design from experienced peers.
 - Encourage collaboration and cross-referrals among members, promoting a supportive environment for shared services.
- 7. **Events and Workshops:**
 - **Guest Speakers and Experts:** Invite guest speakers and experts to provide insights on various topics such as leadership, high performance, and niche marketing.
 - **Interactive Workshops:** Conduct interactive workshops on specific goals like journaling, publishing books, and work-from-home strategies.
- 8. **Technological Integration:**
 - **Tech Support:** Help with integrating new technologies and virtual learning tools into members' workflows.
- 9. **Changing Perceptions and Collaboration:**
 - Bridge the gap between consultants and the general ATD sessions to showcase the value of consultants' knowledge and skills.
 - Advocate for consultants to be recognized and compensated for their expertise shared outside of the group.
- 10. **Community Engagement and Support:**
 - Maintain SIGs and group activities to facilitate collaboration and prospect opportunities.
 - Create a platform for honest, tactful feedback and opinions, fostering a supportive community atmosphere.