

DIARY OF A CONSULTANT



People who need people.

By David Zahn

In last month's entry, David shared some of the troubles he faces as a club member of the frequent consultant travelers who are often spotted in airports looking vacant eyed. This month, David stays close to home, but with his head in the clouds and his eyes on the stars as he considers the merits of hiring more consultants or aligning with strategic partners.

2000

November 13

A new workweek is beginning after I've shivered on the sidelines watching my two sons play their second-to-last soccer games of the season. I'm still

slightly hoarse from exhorting kids with runny noses and skinned knees to play their positions, not get caught on part of the field where they don't belong, and pass the ball back and forth until they get a good shot opportunity. It has me thinking: No one claps when I write a flawless memo, but is there such a big difference between these young soccer players and me?

On the way to work, I turn off the radio and begin to think about what this business entity of Clow Zahn Associates is all about. What do we stand for and what are we attempting to evolve into? When Jeff and I first

started to dream this dream, he was clear that he wanted to work hard enough to afford the things he felt were reasonably due to an executive with his capabilities. He wanted to take off when the mood struck him, spend time with his wife and children, and make enough money to eat out and buy a few luxury items.

I envisioned the same thing for myself, but now, less than a year into Jeff's and my "marriage," I'm reassessing what I want. Jeff has been unwavering in living the life he set out to live and doing what needs to be done to maintain that. I, on the other hand, am beginning to grow perhaps greedy. I want more. I've tasted success and suddenly fear there are too few hours in the day to grab it with both hands.

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I pull into the parking lot of my 9 a.m. appointment and decide to shelve such ruminations until I can devote more time and construct a quadrant chart analysis or assess our opportunities using one of my consulting processes. Right now, a client is expecting me to do my best, and I owe it to the client to deliver that.

November 15

8 a.m. *I schedule a two-hour block of time* in my Handspring Visor to get back to the nagging question of CZA's direction and to try to decipher what I meant by "soccer analogy"—a notation in my PDA. Maybe it's a graffiti error.

2 p.m. OK, time to get serious. Jeff and I started this business to deliver high-

quality sales training and have done well in that regard. Jeff's facilitation and client-management abilities resonate with everyone we've worked with, and are mentioned often in the project recaps and evaluations we ask clients and key contacts to complete. My strengths are in the instructional design of our projects and the operational end, including dealing with accountants, suppliers, and attorneys.

I've been willing to stretch what CZA does to include writing policy and procedure manuals (something I'd done before CZA) and to get involved in strategic projects, training function establishment, and client-customer research. In many ways, we're becoming more of a full-service consulting firm

than we first envisioned. It's exhilarating, but to branch out is counter to our strategy. We don't want to water down our ability by no longer being industry- or functional-specific experts.

Yet, with only two of us available, we have to be choosy about what we pursue and where we dedicate our resources. It's actually an embarrassment of riches: We aren't struggling to find assignments; we struggle with deciding which to chase and which not to bother with. With a careful eye toward cash flow and finances, I approach Jeff with what will be our first major strategic decision: Which of the various paths should we take? Turn away business and retain our boutique niche (and recognize CZA will earn only the maximum for two people

billing)? Hire additional staff to focus on sales training so we can expand our capabilities? Hire staff who can contribute beyond our current core strengths? Or partner with other consulting firms focused on complementary practices?

I no longer favor option 1, though Jeff seems content to follow it. I want to see whether we can build the business into something larger than just the two of us. I don't have illusions (delusions?) of becoming the next Boston Consulting Group, but I do want to see whether we can expand our reach. Options 2 and 3 mean putting skin in the game beyond Jeff's comfort level. Though he's not averse to broadening our capabilities or availability, he's loathe to commit to the ongoing expense of an additional employee when we've yet to have an availability conflict. Option 4 appeals to us both. Jeff views it as a selling and marketing opportunity in which to have additional feet on the street selling our services; I also view it as that and as a way to provide more comprehensive offerings and greater breadth and depth to clients.

After that discussion, we call it a day. On my way home, I consider how I'll determine which consulting organizations or product and service providers to pursue as potential partners or alliances. My first thought is, *What do we have to offer them in exchange?*

November 20

My first foray is with a provider of a technology and sales tool many of our clients and competitors use to make presentations or perform ad hoc queries. Jeff and I meet with the CEO, and we all agree there are synergies: 1) the opportunity for us to train people on how to use the tool as part of a selling process and 2) better-trained users of the provider's tools, who will (the company hopes) want to purchase more

sophisticated tools. The CEO delegates the task of building our new alliance relationship to a staff person charged with business development.

With eagerness and fantasies of this new relationship taking off, I talk weekly with the staff person: Who are your clients? When can you get us in to see them? What leads do you have for us? Who else do you know that can use our services? Not easily dissuaded (or perhaps unwilling to recognize telltale signs that this isn't a match), I invite our new alliance on a sales call to pitch a joint project. They drag their feet, however, and don't give me the information I need to write a proposal for our mutual client. Then they plead with me to provide *my* information so they can do me "the favor" of writing the proposal. The proposal goes to the client on *their* letterhead with *their* recommendation, which includes CZA as a fourth option under a separate agreement. When I hear the dot.com client went under before it could sign the contract, I wonder whether to rejoice.

December 1

The second attempt at forming a strategic alliance involves a senior exec who seems to know only one speed—hyper. In the span of a 40-minute conversation, he wants to construct press releases, discuss product innovation ideas, quiz me on instructional design, compare notes on clients we have in common, and chat about sports. I'm sure I've just met the best match for Clow Zahn Associates.

That delusion lasts until I also ask him to accompany me on a client call. When the meeting is rescheduled, I call to inform Mr. Super Speed, whose assistant tells me he's out of the country for three weeks mountain climbing and won't be checking voicemail or have access to email. I ask whether someone else can cover and am told there's one

person but he's new and still learning the product line. I politely decline.

December 3

Jeff and I talk into the night (much to the chagrin of our spouses) and decide that perhaps technology and tools aren't where we need to focus. So, we try another venue—marketing. I thumb through my Rolodex and identify two contacts.

December 4

Having been slightly burned by the last two partnership attempts, I approach this one warily. I want to avoid another company's attempt to define partnership as "what's mine is mine, and what's yours is also mine to split with you."

December 7

I resign myself to reconsidering other ways to expand our strategic opportunities and begin thinking of possible employees. Given that Jeff is moving to Texas, it will be up to me to manage any people we hire, and I still think it's not our best move to absorb such costs as benefits and salaries. But I see things through and contact the other consultant in my Rolodex. This time, I'm lectured on how he's a self-made man (his father started the business), and he interrupts my explanation of how we could work together for mutual benefit to answer an "important" call; I'm put on hold. After listening to two choruses of Barbra Streisand's "People Who Need People," I hang up.

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I call the marketing consultant. A woman answers, and in the background I hear a dog barking and a child asking to have her shoelaces tied. I ask if I should've called an office or business number, and she says, somewhat indignantly, "I work out of my home office. My clients understand." (Apparently, someone—me!—interested in sharing revenue and resources doesn't understand.) Then I ask for her email address. It's cutesy. I can certainly understand meshing home and work, but I draw the line at doing business with someone whose email address is the equivalent of DaisyDukes@aol.com. Maybe I'm missing a great opportunity, but I thank her for her time.

I think about my PDA notation, and the meaning comes flooding back to me: My kids' soccer games made me wonder whether they have the right idea to hoard the ball sometimes. Teammates don't always do what you expect them to do. At least, make sure everyone playing the game understands the rules and how to win. If people truly do learn everything they need to know in kindergarten, as the book says, I should study the soccer-playing kids again. There might be a lot of wisdom in the runny noses and skinned knees.

To contact David for further information about his evolution or to share your thoughts with him, call 203.221.2789 or email davidzahn@clowzahn.com.