



*So, you're thinking
about becoming
a consultant?*

Consultant Dilemmas:

*Before you rush to hang
out your shingle, read
about six dilemmas that
you may face, according
to 25 well-seasoned,
national consultants.*

Lessons From the Trenches

BY VIRGINIA BIANCO-MATHIS
AND NANCY VEAZEY

BOOKS ON PROFESSIONAL consulting cover every aspect of the field—from how-to guidelines to essays on ethics. But what's life for a consultant really like "in the trenches?"

A recent graduate class decided to find out. They identified 25 national consultants specializing in human resource or organizational development who are well-established, with at least five years experience as an independent consultant; are well-respected by peers and clients; and are financially successful. Then, each consultant was interviewed.

The consultants identified six dilemmas, common to all, and offered ways they've learned to cope.

Having time vs. having work

Initially, many people see consulting as that proverbial greener pasture where you can have more flexible schedules and live more balanced lives. But as a consulting business grows, you may find yourself working even more ridiculous hours than the ones you used to put in when you worked in an organization. Since most human resource consulting results from referrals, the more work you do, the more potential referrals you get.

One training consultant explains: "I have turned down work because of other work obligations. That is hard to do because you often get work from work. There's a fine line between not getting in over your head and keeping your market lines open."

Consultants seem to live in a roller-coaster world—either too much work or not enough. "My biggest challenge as a consultant is controlling my time. If I'm on the phone all day, I have to spend the evening reading and researching. This isn't a 9-to-5 job."

Tips from the experts.

- ▶ Reconcile yourself to the erratic work schedule.
- ▶ Develop working relationships with a few reliable and talented colleagues who will share projects or will subcontract to do work when you need extra help or specific expertise.
- ▶ Be realistic about how much you can take on. Better to overestimate the time you'll need than to spread yourself too thin. Limit your projects at first in order to determine how long it really takes to accomplish things.
- ▶ Negotiate with clients to have word processing, graphics, materials production, or other time-consuming parts of project work done by their own staffs (saves you time and aggravation, saves the client money).

Doing meaningful work vs. doing work the client demands

One force that drove these consultants to risk working on their own was the desire to be involved with something bigger than themselves—work that makes a difference and to which they are committed. They wanted to leave behind the frustra-

tions of doing the corporate bidding. They believe that consulting allows them to stay on the professional and ethical high ground.

However, reality doesn't always mesh with these ideals; clients, just like corporate bosses, may have agendas less pure than one's own. Consultants are often "told" to conduct training, team building, or reengineering activities that they know will not work. Sometimes they are asked to produce activities with no real thought as to results beyond superficial "head counts" or "smile" sheet evaluations.

Consequently, consultants have to learn to read the signs that spell trouble. Knowing when to walk away can save time, energy, and expense. As one seasoned consultant put it, "no deal is better than a bad deal." Our

■ Clients, just like corporate bosses, may have agendas less pure than one's own ■

consultants shared several warning signs:

- ▶ the client vacillates between action and inaction
- ▶ the client wants to "pick your brain" for free
- ▶ the client starts to withdraw commitment from parts of a project, "nibbling away" at the agreement and making cuts in the budget
- ▶ the client has unrealistic expectations
- ▶ the client wants you to "fix" something without his or her commitment and partnership.

The consultants we talked to stressed that it's critical "to make a good faith effort" with clients and "to accept the uniqueness of each situation or organizational problem." But what if you sense that your client will not accept or work for the changes that must take place in order for your intervention to be successful? One

consultant gave this advice: "Organizations are becoming more and more turbulent, and change is increasingly difficult to implement. If consultants limit themselves to businesses that are committed to change, they would have no business. I have to look at the small ways I can make a difference."

Another consultant warns that you will not always be able to control a situation to get a specific outcome. Consultants must work within limitations like everyone else: "If you respond to a government request for a proposal to provide team leadership skills, and the problem turns out to be gender-based communication, the client can't legally change the contract. In this case, you could possibly work around the situation by giving your team leadership piece a gender-based slant."

Tips from the experts.

- ▶ Mark the starting point for change from where the client is now.
- ▶ Define success for yourself and for your client before any contract or letter of agreement is formulated.
- ▶ Don't take things too personally—there are often hidden agendas and politics that have nothing to do with you.
- ▶ If the client can't be persuaded, calmly discuss the consequences of the situation. Then either walk away or work within the stated constraints.
- ▶ Work the issue over time. The client may not be "ready now" but can be guided over a series of interventions.

Having enough skill vs. being out of your depth

The demands clients make of a consultant exceed those they would make of an employee. They're paying you a lot of money and they expect you to be an expert (remember, they don't really see the total amount they pay their own employees because benefits aren't reflected in the paycheck). Our consultants point out that if the expertise you have is no greater than it was when you worked for someone else, it likely will not be sufficient to sustain you as a consultant. You have to develop new skills and a niche for yourself. One consultant says "When the computer training market became tough and unprofitable, I went back into the corporate

world because I found I did not have the experience in other areas of expertise to go out on my own. People wanted references for management training and I had none."

This consultant's experience repeats itself hundreds of times a week as people who thought they could consult return to corporate life. Even in tough, downsized environments, employers will let you run with training wheels at times. In contrast, consulting requires a whole set of sophisticated skills that few of us learn as employees; even as "internal consultants" there is always a cushion against risk because lower expectations exist for an "insider."

So, how do you acquire this expertise? It can be expensive in terms of time and money, but investing in yourself and your skills is the best way. Says one consultant, "Education is never really over. I subscribe to lots of magazines and read on airplanes. I also read more than one book at a time and network with key people in the business."

Remember when your employer used to send you to seminars, allow you to invest in books and subscriptions, maybe even picked up professional association fees? For a consultant all those expenses belong to you with your intermittent income. Personal growth and constant improvement is a concern. It's hard to spend your money for classes and seminars when you have limited funds. You make very careful choices.

It's important to assess your present skills and build on them. One consultant shares: "My academic background prepared me because I taught and was on the debate team. The discipline of preparation, working with schedule constraints, working irregular hours, and being an information pack rat has served me well as a consultant."

The best advice for someone starting out comes from a training consultant with a five-year-old practice: "Get real good at what you do; if you need help, subcontract to quality people."

Tips from the experts.

▶ What are your greatest strengths and area of expertise? Strengthen your knowledge and skills in that area and exploit it as your niche.

▶ Be an "information pack rat" so that you always have the best and latest scoop on your specialty.

▶ Remember that your education is never really over: subscribe to magazines and set aside part of your budget for books if you can't afford seminars. (When you see a seminar of interest, there's almost always a book out by the same authority which can save you lots of travel time and money.) If you can't attend a particular seminar, order copies of the distributed handouts or taped presentations.

▶ Consider hooking up to an online service that gives you access to colleagues, industry news, trade associations, and research resources in your area of interest.

▶ Form or join a local networking group that shares projects and knowledge.

Marketing yourself and your services vs. working on projects

How do you get started? What magic formula leads to success? The first step for most of our sample was to define exactly what they wanted to do in simple language that any prospective client could understand. Once you've done that, you have a well-defined product or service. The next step? Establish a good reputation and build up your contacts and references.

"Finding and keeping work is about relationships," noted one of our consultants. The best and most cost-effective advertisement is word-of-mouth. Your most important asset is your good name. As one consultant put it: "You have your reputation to think about and those of the people you work for and with. You have to make them look good."

The consultants agreed that you must keep your name in front of people. They suggested going back to companies you've worked for, seeking updates on how they're doing, and keeping the door open for ongoing assignments: "You can't just put all your energies into the current job



without prospecting for the next one."

The consultants also suggested writing articles and books and making presentations. One consultant has now published two books and three videos, and says they've led to numerous speaking engagements and more business.

Tips from the experts.

▶ Keep your network going: professional associations, former classmates and professors, Chamber of Commerce meetings, new colleagues—all are potential sources of work.

▶ Do some volunteer or community outreach work. Let this be a "taste" of what you can do for pay; treat this as an audition to get referrals.

▶ Write newspaper, newsletter, or magazine articles to get your name in front of prospective clients. Set aside time to market your services and prospect future work at least two or three times a week.

▶ Watch the publications you read, especially local ones, for references to people who are involved in work that complements your niche specialty. These could be potential clients, sources of new information, or people who will refer you to others based on their meetings with you.

▶ Teach a course at a local community college, university, or community education program.

Keeping it small vs. expanding your business

You are only one person. This limitation finally occurs to all consultants. As your work expands, you need more resources to meet the demand. You must find a way to leverage what you do or one day you'll wake up and find you don't have a business. How many seminars can you conduct in a week? What time does that leave you for producing new products and services and marketing your business? There are only so many productive days and hours in a week, so unless you can leverage, you're going to have limitations on your income.

As one consultant puts it: "I work

with several people, but do not have an actual partner. When I subcontract, I function as a quality control check."

Tips from the experts.

- ▶ Find someone who can help you do what you do. Start small by subcontracting for chunks of projects to make sure this person is reliable and a good fit for your business before you move on to more serious commitments, like an associate or partnership relationship.
- ▶ Take on a related product or process that you promote as part of your practice and reap the rewards of a larger company backing you up. Decide up front exactly how this product fits into your practice and keep things in perspective; avoid becoming a sales representative unless that's really what you want!
- ▶ Subcontract work to people that you trust. Free yourself from administrative work and other chores so you can concentrate on working with clients.
- ▶ Get advice from a small business consultant, but be realistic about how much control you want to give to others in order to expand your business. Some basic questions you need to ask yourself: How much income do I want and need? Do I have the financial resources to pay other people during startup when not much income may be coming in? Will the subcontractors wait for their money until my clients pay? What arrangements do I need to make regarding the ownership of intellectual property (will I hold the copyright on the course materials someone else produces)? Do I want employees, or will subcontractors suit me better?

Having values and traits that support vs. values and traits that hinder

Peter Block in his classic book *Flawless Consulting* advises that "being authentic...is the most powerful thing you can do to have the leverage you are looking for to build client commitment."

Trust lies at the heart of a successful client-consultant relationship. It follows that the successful consultant possesses traits that nurture authenticity and trust. Almost all of our consul-



tants touched on this issue offering heartfelt advice gained from tough lessons learned "in the trenches."

On being an equal partner:

- ▶ When you find your own needs won't be met, decline the project.
- ▶ If you find there is no match, walk away but preserve the relationship for

another time.

- ▶ The assignment must be a solvable problem; avoid being the tool of management just to prove their point or becoming a scapegoat when things don't work out.

- ▶ Establish inside-outside partnerships; transfer skills to the client.

On establishing a trusting relationship:

- ▶ The consultant must take the lead in being vulnerable.

- ▶ You can't be tripped up by mis-cues from your client. Talk about your feelings. Affirm what you think is happening. Don't judge what they're doing, just let them know you know what is happening.

- ▶ Genuinely care about your clients. You must be intuitive and not just deal with what's on the surface.

- ▶ Deliver data in ways that lead to insight and action, not fear and resistance.

- ▶ Confront the client in an immediate and authentic manner. (Have an escape clause in your contract in case the situation becomes untenable.)

A large part of trust comes from delivering on your promises.

- ▶ Never over promise on the results you can deliver.

On lifestyle decisions and personal development:

All 25 consultants commented on how the process of consulting forces a person to examine his or her own life and skills. Unlike being in a corporate job, you can more easily control the pace, environment, and interactions of your daily work. As you move through your own developmental stages, you can continually adjust your work situations. Some questions the consultants grapple with:

- ▶ Will I be happy working at home, or do I need the structure and social interplay of an office setting?

- ▶ If I opt for a home office, how will my family react? Will they cooperate

with me and support me in keeping to my work schedule? When I'm stressed by a deadline, how will my stress affect them?

- ▶ What image do I want to project to my clients? How do I see myself in this new situation?

- ▶ Do I have workaholic tendencies that might make it difficult for me to "leave work" when my office is at home?

- ▶ Do I have the computing skills necessary to work in a "virtual business" setting?

- ▶ How much money do I need to make to sustain an acceptable lifestyle for myself and my family?

- ▶ Are there patterns in my interpersonal behaviors that are getting me into trouble; i.e., anger, need to control, procrastination, too direct or not direct enough, abrasive, fear of confrontation, inflexible?

- ▶ Are there certain consulting techniques that I need to perfect; i.e., negotiation, data analysis, process consultation, presentation skills, separation and termination?

Some final thoughts

Four key consulting skills emerged from this study: listening, marketing through continuous networking, authenticity and assertiveness in addressing interpersonal issues, and intuition.

The results of this study strongly suggest that the six dilemmas can only be managed by leading an "examined life." The best consultants seem to be driven by the need to make a difference through helping others. It was evident that the consultants we interviewed were equally dedicated to both process and outcomes.

And lastly, but most importantly, they all said they were having fun. ■

.....
Virginia Bianco-Mathis is an associate professor at Marymount University, School of Business. She can be reached at 4206 Pineridge Drive, Annandale, VA 22003. Phone: 703/698-8418. Nancy Veazey is president of Trainingsmith, 4912 Lackawanna Street, College Park, MD 20740. Phone: 301/982-9746 or via the Internet at nveazey@umdacc.umd.edu.

To purchase reprints of this article, call ASTD Customer Service, 703/683-8100. Use priority code 291.