



First Things First: Why Consulting?

In this chapter you will

- Define consulting
- Identify the experiences, skills, knowledge, and attributes that will lead you to a successful consulting career
- Assess your consulting aptitude
- Identify your initial consulting focus
- Test your entrepreneurial attitude

Consulting: What Is It?

A consultant is a professional who provides unique assistance or advice to someone else, usually known as the *client*. The assistance is usually advisory, strategic, or tactical in nature. The work is defined by the consultant's expertise, the structure in which the consultant works, and the process the consultant uses.

Expertise is based on what a consultant knows and has experienced. It can be anything from gardening to the stock market; from astral projection to pig farming; from organization development to preventing child abuse; from manufacturing to mining emeralds.

The structure within which the consultant works varies. You can work for a firm—for example, one of the large worldwide accounting firms, all of which have consulting branches. You could also work for a small or medium-size consulting firm or with a partner in your own office. Other possibilities are working in a virtual organization with a loosely structured relationship with other consultants across states or even nations, working as a subcontractor to any of those I have listed, working by yourself from a home office, or any of a dozen other structures.

The process a consultant uses is usually within one of the steps of problem solving. For example, a consultant might help a client in these ways:

- *Identify the problem:* “Why aren’t our online sales growing the way we anticipated?” A consultant might identify the problem as a wasteful use of resources or a lack of repeat business.
- *Identify the cause:* “What is causing limited repeat business?” A consultant might identify the cause as sales staff who are rewarded more for new than repeat business, as poorly designed electronic tracking systems, or as employees with poor customer service skills.
- *Identify the solution:* “How do we ensure that our employees have the skills they need?” A consultant might identify solutions such as hiring more highly skilled employees, offering higher compensation to attract and retain skilled employees, or using coaching to improve the customer service skills of current employees.
- *Implement the solution:* “How can we improve our employees’ customer service skills?” A consultant might help implement a solution by designing and delivering customer service skills training, creating a mentoring program that encourages on-the-job skill sharing, or establishing a monitored customer call center that provides feedback to each employee.

Isn’t it likely that an organization already has these skills within its workforce? Employees who can identify the problem, cause, and solution and then implement the solution? Yes, probably, but they still might hire you. In today’s rapidly changing world, businesses count on consultants to build the agile workforce they need. Consultants can provide the expertise on demand and are reimbursed for what they’ve contributed.

As a consultant you will likely be more efficient, because you will bring related experience that you’ve gained on other projects. That shortens your learning curve. You will have the luxury of focusing solely on the assigned project or problem and will not need to spend time on the organization’s internal meetings and tasks.

You might also bring a unique skill set or expertise to a client's problem. Consultants also offer a fresh objective point of view. With hundreds of other projects and valuable experience under your belt, you can provide an unbiased fresh approach.

To summarize, consultants' expertise, the structure in which they work, and the process they use define the work. Consultants' experiences usually lead them naturally to each of these three elements. Experience and education provide the expertise that leads them to the field in which they specialize. Experience in other organizations as well as the lifestyle a consultant chooses lead them to using the right consulting structure. And experience also provides the consultant with the process, usually based on what the consultant has used in past work or the process the consultant's company uses.

Why a Consulting Career?

Do you awake on Monday morning, hop out of bed, and say, "Job, I missed you over the weekend! I can't wait to get to work!"? You don't? Well then, perhaps you are holding the right book.

No one should have to get up in the morning and go to work. Instead, we should all be able to get up and go to play. That is, we should enjoy our work so much that it seems like play. Most of us, however, distinguish work (what we must do) from play (what we'd rather be doing). Unfortunately, most of us get up and go to work every morning and save what we'd rather be doing for later in the day or later in the week. Consulting affords the opportunity for your work to be what you'd rather be doing. How could that be? As a consultant you will have:

- The flexibility to determine when you work, where you work, with whom you work, and what kind of work you do
- The opportunity to use the skills, experience, knowledge, and expertise that you possess and enjoy using
- Control over how much money you will earn
- A chance to do more meaningful work, make a difference in the world, and address that greater calling that comes from within
- An opportunity to travel—beyond fighting the traffic on your daily trek to the office

- The challenge to do more complex, exciting, or difficult work, to learn and grow
- The opportunity to manage and stabilize your own career in the current chaotic workplace
- The ability to live in a different location

Life is too short to sit in traffic! Or to do anything less than what you really want to do. I grew up on a farm in Wisconsin with a strong entrepreneurial spirit. I knew that I would never be a good employee: organizations didn't move fast enough for me; they were risk averse, and did little to release my creative spirit. I knew that consulting was an opportunity for me to take risks, try my own ideas, and be 100 percent responsible for my successes and my failures. Unfortunately, even when people are given a chance to create the kind of work they wish to pursue, they are sometimes unable to do so because there are so many choices. This book will help you begin to narrow those choices by identifying your experiences (opportunities for learning), your competencies (skills and knowledge), and your aptitude (natural talents and personal qualities).

And of course, it isn't all good. The drawbacks include a lack of regular paycheck and benefits, a lack of support services, and working alone. A lack of IT support is a big one for me. I remember spending two days writing my first very large proposal on my Apple IIe and losing the entire thing in two minutes. Needless to say, I learned to print as I went along, adding to lots of other lessons all new consultants learn.

So are you still interested in a consulting career? In the next sections you will explore the experiences, competencies, and attributes that will help define your consulting role. Let's begin by identifying the experiences you have had that would lead you to pursue a consulting career.

Explore Your Experiences

To begin to narrow your consulting choices, examine the expertise you've gained over the years. Although it's sometimes difficult to name your own expertise, you can easily identify experiences you've had. The skills and knowledge you've gained from your experiences help define your consulting role. (We will further explore the structure you will consider in Chapter Four to round out your role definition.)

Identify all the industries in which you have worked:

Identify all the volunteer experiences you've had:

Identify the organizational levels with which you have experience:

Review your various breadth and depth of experiences:

Identify the experiences that were the most rewarding and enjoyable:

Identify the experiences that were the most negative and unpleasant and that you wish to avoid in the future:

The experiences you've had provide you with a level of expertise for which clients will pay. Later in this chapter, you will use the information you have recorded to begin to identify your consulting focus.

Inventory Your Competencies

Everyone is very skilled or very knowledgeable about at least one thing. My plumber, Owen, for example, is the most knowledgeable person I know about anything that goes wrong with my plumbing. He can diagnose problems over the telephone and is highly skilled at making a quick repair.

Identify the knowledge and information you have. For example, a computer salesperson knows about sales and probably has also learned time management skills; a nurse may have taken workshops and read several books to improve communication skills.

List the things you do better than most other people:

List the things for which colleagues, employers, friends, and family come to you for assistance:

Identify special classes, courses, or seminars you've taken:

List special certifications, licenses, credentials, or warrants you hold:

List the problem-solving processes in which you are competent—for example, team building, Lean Six Sigma, root cause analysis, brainstorming, force field analysis, flowcharting, or dialogue facilitating:

List things you know a lot about:

The skills and knowledge you already possess in your area of expertise will help you define your consulting role later in this chapter.

Skills and Knowledge Required of Consultants

Consultants frequently underestimate the range and depth of skills required to lead a successful business. Most new consultants require more skills than they think they do. From the following list, circle the skills and knowledge for which you require improvement. Now check the three or four that when improved will make the greatest difference as you begin your consulting role:

- Prospecting and marketing
- Diagnosing client needs
- Gathering data through interviews and surveys
- Improving processes
- Playing roles such as trusted advisor, change agent, or initiator
- Managing expectations
- Addressing resistance
- Managing and facilitating change
- Identifying mutual expectations

- Estimating and pricing projects
- Completing paperwork on time
- Analyzing business data
- Using technology for research and to deliver services
- Designing solutions
- Developing talent
- Solving problems
- Building relationships
- Communicating with others
- Writing proposals and reports
- Conducting training
- Facilitating meetings
- Coaching managers
- Implementing intervention models
- Understanding and improving processes

Identify how you might gain the skills and knowledge you need:

Continuing to gain skills and knowledge is an investment in you. Every time you add to your knowledge base or increase your skills, you become more valuable as a consultant.

Assess Your Consulting Aptitude

Malcolm Forbes, publisher of *Forbes* magazine, has been credited with saying, “Too many people overvalue what they are not and undervalue what they are.” Consulting takes a certain aptitude—those natural talents and personal qualities we all have. It might be the ability to solve a problem methodically or the creative talent to see the problem as a solution. Don’t underestimate your natural talents and abilities. And if you know your weaknesses, also know that you can overcome them.

Are You a Match for the Profession?

The following statements identify the aptitude, natural talents, and personal qualities it takes to be a consultant. Check all with which you agree:

- I am a hard worker.
- I am in good health.
- I am a risk taker.
- I have a thick skin; being attacked as a pest, “beltway bandit,” or con man does not bother me.
- I am persistent and determined.
- I am a big-picture person.
- I pay attention to details.
- I am an excellent communicator—oral and written.
- I am open-minded.
- I can think critically.
- I am an independent self-starter.
- I can promote myself.
- I can balance logic and creativity, big picture and details.

- I know my limitations.
- I can say no easily.
- I am self-disciplined.
- I am confident.
- I am competitive.
- I am flexible.
- I am a goal setter.
- I complete tasks.
- I am reliable and trustworthy.
- I like to work with people.
- I have passion for what I do.

Although the number of statements you checked will not guarantee success as a consultant, the statements you did not check point to challenges you will face as a consultant.

Which natural talents and abilities need the most improvement and attention?

Whom could you ask for a candid appraisal of your responses?

How will you adapt or acquire talents and aptitudes that aren't natural for you?

Whom could you ask for assistance?

Pull It Together: Your Initial Consulting Focus

You have spent time examining your experiences, your competencies, and your natural aptitudes. Now translate that into what a client might buy:

What experiences do you possess for which a client would be willing to pay?

What skills and knowledge do you possess for which a client would be willing to pay?

What natural talents and personal qualities do you possess for which a client would be willing to pay?

To what aspects of the problem-solving process would you be likely to contribute: identify the problem, identify the cause, identify the solution, or implement the solution?

What can you offer that will benefit clients? Check the items on this list that fit you, and then add several of your own.

- | | |
|---|---|
| <input type="checkbox"/> Diagnostic skills | <input type="checkbox"/> Flexibility |
| <input type="checkbox"/> Listening skills | <input type="checkbox"/> Creativity |
| <input type="checkbox"/> Analytical skills | <input type="checkbox"/> New ideas |
| <input type="checkbox"/> Writing skills | <input type="checkbox"/> Fast turnaround |
| <input type="checkbox"/> Research skills | <input type="checkbox"/> Meeting deadlines |
| <input type="checkbox"/> Organizational skills | <input type="checkbox"/> My publications |
| <input type="checkbox"/> Strategic planning skills | <input type="checkbox"/> My completed research |
| <input type="checkbox"/> Investigative skills | <input type="checkbox"/> My contacts |
| <input type="checkbox"/> Change management experience | <input type="checkbox"/> My patents |
| <input type="checkbox"/> Leadership skills | <input type="checkbox"/> Knowledge |
| <input type="checkbox"/> Objectivity | <input type="checkbox"/> Network of other experts |

Experience with _____

Expertise in _____

Now take a first cut at describing your consulting work by completing the statement below. Some examples follow.

I am a _____ consultant who helps
my clients to _____ .
This benefits them _____ .

Examples

“I am a process improvement consultant who helps my clients become more efficient. This benefits them by reducing redundancy, increasing quality, decreasing time spent, and reducing cost to the customer.”

“I am a web design consultant who helps my clients define and design websites. This benefits them by creating a professional-looking website in one-tenth the time and at half the cost.”

We’ll refine your niche in later chapters.

Entrepreneur Attitude: Do You Have What It Takes?

In addition to the experience, competencies, and aptitudes that make up your expertise, you must realize that becoming a consultant means that you are joining the entrepreneurial ranks. The Entrepreneur Attitude Survey shown here will tell you whether you have what it takes to become an entrepreneur.

The Entrepreneur Attitude Survey

Instructions: Rate yourself on the following qualities. They represent the thinking of several authors about the requirements of a successful business owner. Spend ample time pondering these questions and answer honestly. Rate yourself on a scale from 1 to 4 as follows:

1 = strongly disagree 3 = agree
2 = disagree 4 = strongly agree

Circle your answers.

- | | | | | |
|--|---|---|---|---|
| 1. I usually try to take charge when I'm with others. | 1 | 2 | 3 | 4 |
| 2. I can do anything I set my mind to. | 1 | 2 | 3 | 4 |
| 3. I have a high tolerance for difficult situations. | 1 | 2 | 3 | 4 |
| 4. I believe I can always influence results. | 1 | 2 | 3 | 4 |
| 5. I am complimented on my ability to quickly analyze complex situations. | 1 | 2 | 3 | 4 |
| 6. I prefer working with a difficult but highly competent person rather than a friendly, less competent one. | 1 | 2 | 3 | 4 |
| 7. I can fire employees who are not producing. | 1 | 2 | 3 | 4 |
| 8. I'm willing to leave a high-paying, secure job to start my own business. | 1 | 2 | 3 | 4 |
| 9. I push myself to complete tasks. | 1 | 2 | 3 | 4 |
| 10. I can work long hard hours when necessary. | 1 | 2 | 3 | 4 |
| 11. I need to be the best at whatever I do. | 1 | 2 | 3 | 4 |
| 12. I do not become frustrated easily. | 1 | 2 | 3 | 4 |
| 13. I thrive on challenges. | 1 | 2 | 3 | 4 |
| 14. I become bored easily with routine tasks. | 1 | 2 | 3 | 4 |

- | | | | | |
|---|-----------------------------------|-------------------------------------|---|---|
| 15. I dislike being told what to do. | 1 | 2 | 3 | 4 |
| 16. I have a higher energy level than most people. | 1 | 2 | 3 | 4 |
| 17. I have held numerous leadership positions. | 1 | 2 | 3 | 4 |
| 18. I have the skills and enjoy accomplishing a complex task by myself. | 1 | 2 | 3 | 4 |
| 19. I can change my course of action if something is not working. | 1 | 2 | 3 | 4 |
| 20. I am seen as a creative problem solver. | 1 | 2 | 3 | 4 |
| 21. I can balance the big picture and details of a business at the same time. | 1 | 2 | 3 | 4 |
| 22. I can predict how actions today will affect business tomorrow and in the future. | 1 | 2 | 3 | 4 |
| 23. I need at least _____ hours of sleep to function effectively. | 1 = 8 hours
3 = 6 hours | 2 = 7 hours
4 = 5 or fewer hours | | |
| 24. I have at least _____ years of experience in the business I will start. | 1 = 1 year
3 = 4 years | 2 = 2 years
4 = 5 years | | |
| 25. Over the past three years I have missed a total of _____ days of work due to illness. | 1 = over 15 days
3 = 6–10 days | 2 = 11–15 days
4 = 0–5 days | | |

Scoring: Total the numbers you circled.

- | | |
|--------------|---------------------------------------|
| 90 to 100 | Go for it! |
| 82 to 89 | Good chance of success |
| 74 to 81 | Pretty risky |
| 73 and below | Better continue to collect a paycheck |

Although this survey can give you a general picture of what it takes to be a successful entrepreneur, only you can decide whether the move is right for you:

What did you learn about yourself?

What concerns you the most about being an entrepreneur?

What obstacles might you need to overcome? How will you do that?

What strengths will you parlay to your benefit? How will you do that?

Quick ▶ TIP

If your score was not as high as you would have liked it to be, call your local university or technical college to learn whether it offers classes in entrepreneurship. Ask for the reading list and syllabus. If you decide you do not wish to take such a course, you may at least want to read some of the books from the reading list to bolster your knowledge about what to expect.

Quick Start ACTION

Questions to Ask a Consultant

Before you begin the next chapter, interview a consultant. Consider it your take-a-consultant-to-lunch assignment. Gain as much information as you can about what it's like to be a consultant. You will not be able to ask all the questions listed, so prioritize those that are most important to you. I'm sure you will think of many others.

- How long have you been a consultant?
- How did you start?
- Why did you decide to become a consultant?
- How would you describe your consulting practice?
- How have you structured your business and what are the advantages and drawbacks of that structure?
- What do you do for clients? What problems do you solve?
- What's a typical project like?
- What's the biggest lesson you've learned as a consultant?
- Could you tell me about a time when you faced a difficult decision and how you handled it? What did you learn from it?
- What's a typical day or week like for you?

- What are the work/life balance issues for a consultant, and how do you address them?
- What marketing activities do you conduct?
- What process do you use for pricing projects?
- What's the greatest challenge for you as a consultant? The most frustrating?
- What would you do differently if you could start your consulting practice over again?
- How can I best prepare myself to become a consultant?
- What would you miss the most if you quit consulting?
- What should I have asked about that I didn't?



After your interview, think about what you learned about consulting. How has it reinforced or changed your thoughts about consulting? Are you still interested in a consulting career?

Now that you have defined consulting and identified the experience, skills, knowledge, and attributes that you have that will lead you to a successful consulting career, you are ready to plan that career. Use the Quick Start Lists on the next page to capture your thoughts before moving on to Chapter Two. You will find Quick Start Lists at the end of each chapter. As you read future chapters and identify items you wish to remember, turn to the back of that chapter and record the actions you want to take, the ideas you think of, and the questions for which you want answers.

