

**THE NEW**  
**CONSULTANT'S**  
**QUICK START GUIDE**

**AN ACTION PLAN  
FOR YOUR  
FIRST YEAR IN  
BUSINESS**

**ELAINE BIECH**

**WILEY**



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“A must-read for people who are considering a career in consulting. The book is filled with realistic and practical ideas—a great way to learn all the tricks of the trade from one of the best!”

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“Anybody who wants to quit his or her day job to join the legions of free-agents and consultants needs this book. There are so many facets of the consulting business, and Elaine provides the quickest road to plan for success. This book will dramatically reduce your learning curve.”

Kristin Arnold, president, Quality Process Consultants, Inc.

“A logical, step-by-step guide through the consulting jungle. Follow Elaine’s lead as if your business life were depending on it!”

Linda Byars Swindling, “The Peacemaker” and co-author, *The Consultant’s Legal Guide*

“Elaine Biech has done it again! For anyone considering leaving the corporate world to become a free agent, this practical book is enormously valuable. Even established consultants would do well to review and learn from Elaine’s focused and efficient set of tools and principles. Save yourself a lot of time and effort—buy this book and use it before, during, and after you begin your consulting practice.”

B. Kim Barnes, CEO, Barnes & Conti Associates, Inc.

“A quick start is no longer a luxury—it’s a survival strategy! Elaine Biech’s newest comprehensive resource can save you precious time and money when you need it the most. Learn from a ‘master’ who has built a very successful consulting business—you won’t regret it!”

Ann Herrmann-Nehdi, author, *The Whole Brain Business Book*, board chair and Chief Thought Leader, Herrmann International

*The New Consultant's*

Quick



Start

*Guide*



*The New Consultant's*

Quick



Start

*Guide*

An Action Plan  
for Your First Year  
in Business

elaine biech

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*For Shane and Thad*

*You ensured that I learned  
the value of a Quick Start*





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Elaine Biech  
ebb associates inc  
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# Introduction

## Why This Guide?

Books make a difference in people's lives. Just last week I met Marin Burton, a senior faculty member at the Center for Creative Leadership, where I am on the board of governors. She shared that she first learned of me when she was a freshman at the University of Wisconsin. Marin had discovered the excitement of facilitation and developing others, much to the chagrin of her father, who wasn't certain she could make a living using these frivolous skills. Coincidentally, her father and I had a mutual friend who worked at S.C. Johnson in Racine. He recommended one of my books, *The Business of Consulting*, and Marin's father gave it to her. The book reassured both father and daughter that one could make a living in the field of consulting. Marin now has a PhD, develops global leaders, and still has the book and the note I wrote to accompany it 20 years ago.

There is more to this brief coincidence than that we both grew up in Wisconsin and that we are in the same profession that we both love. It is really about consulting. Consulting is not just about making a living. It is about making a difference. As a consultant you will have many Marin-Magic Moments. People will stop you at conferences and tell you how you changed their lives. After a project with a client, employees will tell you what a difference your support made in their departments. And you will bump into people after an event or a training class when they reiterate a simple statement that you said dozens of years before that sparked a vision for them.

Consulting is about making a difference in people's lives. It's about achieving your vision while helping others achieve their visions, too. This book gives you a quick start toward your vision. The book that Marin read ends with the words "Wish on paper, and it becomes a plan." This book, *The New Consultant's Quick Start Guide*, provides the paper that you may use for wishing.

*This book* can become your plan—your blueprint for a consulting start-up. It includes questions to stimulate your planning, worksheets to develop your plan, and ideas to keep you motivated and moving forward.

This book is a companion to *The New Business of Consulting*; however, you do not need to have a copy of that book to have success with this one. I do cross-reference the two books so that they make sense if you are using both.

We are providing a bonus for you related to *The New Business of Consulting*. You will find many of its checklists, assessments, templates, financial forms, and other tools in this book.

## Why Consulting?

The gig economy has brought a renewed and swelling interest in consulting. It's an ideal time to consider the profession. Management consulting exceeds \$250 billion, with over 700,000 consulting firms providing services across all facets of business globally. The industry grows every year. The introduction of the current gig economy and the rapid changes in demographics and advances in technology have led companies and talent to engage in profoundly new ways—and consulting is one of the keys to success.

**More respected than ever.** Freelance consulting is viewed as a win for companies and consultants alike. Businesses count on consultants to build an agile workforce. Consultants can provide the expertise on demand and are reimbursed for the amount of time they are required to be on the job. Even large consulting firms are getting in on the gig economy, recognizing that they cannot support the large cadre of consultants they've had on staff in the past. In fact, in 2016 PricewaterhouseCoopers (PwC) launched its Talent Exchange, an online platform that finds independent consultants with relevant skill sets to work on PwC projects.

**Increased desire for job satisfaction.** Working 9 to 5 has become less desirable, especially for the Millennial generation (and the baby boomers, too) who are looking for work that gives purpose and meaning to life while also offering a good salary, flexibility, and autonomy. This brings problems with it. Consultants usually know their content, but they rarely know how to run a business. This book closes

that gap by offering tools and techniques to help an entrepreneur to also manage a successful consulting business.

**Access to comparable and better salaries.** Consulting in the gig economy gives you a chance to make more or the same amount of money that you would in a traditional role. I have helped hundreds of people start their consulting businesses, and their biggest downfall is not knowing how to charge for their expertise. With the right advice, consultants can create a profitable six-figure income and more. This guide can get any new consultant started down the right path.

## Who Will Find This Guide Useful?

You will find this guide useful if you are thinking about trying your hand at becoming a consultant. Whether you intend to join the gig economy as a full-time freelance consultant or as a part-time side hustler, this guide walks you through the many issues you'll encounter in determining whether this profession is right for you. You will explore whether you have the required skills and attributes to be a successful consultant. You will rate yourself against other entrepreneurs. You will identify personal, professional, and financial considerations necessary to ensure a quick start. And you will also explore your preferred future to determine whether consulting will allow you to achieve your professional and personal life goals.

You may also find this guide useful if you are new to the consulting profession and want to upgrade your consulting business acumen. Perhaps you started your practice but didn't have time to develop a marketing plan. This guide presents questions for you to answer to create your marketing plan, and an overview of the ABCs of marketing puts the task in perspective. Perhaps you didn't take the time to write a business plan, and now you find yourself heading in many directions at the same time and wondering whether there's a better way. The guide walks you through the steps of developing a business plan. Perhaps you thought consulting would lead to more control of your life, but instead you find yourself drowning in paperwork and trying to balance a completely out-of-control schedule. The guide shares tips, tactics, and tools to bring both your paperwork and your schedule back under your control.

You will find this guide useful whether you have previously read *The New Business of Consulting* or not. If you have, you will be prepared for many of the activities, assignments, and exercises in this book. And you will have read the practical advice and the real-world examples that support the exercises. If you have not read *The New Business of Consulting*, this guide provides a painless, fill-in-the-blank, practical approach to setting up your consulting business. It takes you through the

highlights of establishing your consulting business. Nevertheless, you may still wish to purchase *The New Business of Consulting* if you want a more comprehensive discussion of the topic.

## How to Use This Guide

Are you wondering:

- What the heck will I consult about?
- How do I figure out how much to charge?
- Who will be my clients and how will I approach them?
- How do I get my name out there?
- What legal responsibilities do I have?
- Am I really ready for this?

If these are your questions, you are in the right place. This book will guide you through the start-up quagmire, which really isn't that complex at all—as long as you progress in a logical, systematic direction. And that's where I can assist. I have helped more than 500 consultants at various stages of their careers—and this isn't even how I make a living. I can help you, too.

I encourage you to write directly in this book. Ample room has been provided for you to write most of your permanent plans directly on the pages.

This book has been designed for you to begin with Chapter One and work in order through the chapters to the end. Naturally you have your own unique needs, so you may wish to pick and choose the chapters (as well as the activities) that seem most pertinent to your situation. Of course, you will be the best prepared and most assured of success if you work through the entire guide.

If you are contemplating the consulting profession, I encourage you to begin with the activities in Chapters One and Two. They focus on planning your consulting future and will help you determine whether consulting is truly for you. You may also wish to work through those two chapters if you are already a consultant and not enjoying it as much as you anticipated. You may be able to figure out why and what you can do to change.

Chapters Three and Four are critical to ensure that you spend enough time planning for your successful consulting practice. These chapters address business structure and revenue issues. Insurance has become more important than

ever, so Chapter Four has a list of questions to guide discussions with potential insurance brokers. You'll also find an electronic resource to help you unravel the insurance mystery.

Chapter Five will walk you through developing your business plan. If you are already consulting and have skipped this step, it's never too late to go back and plan now. In fact, a lack of a business plan may be one of the reasons you are not enjoying consulting or perhaps not as successful as you desire. This guide uses a question format that makes putting your thoughts and ideas on paper quick and easy.

Chapter Six is chock-full of ideas for making the transition from an internal job to external consulting as painless as possible. You will appreciate a list of suggestions for creating a discussion with your boss about your future plans.

Chapter Seven is all about your office: the whats, wheres, hows, and whys of running an efficient office. Working out of your home may seem like the easiest choice you have to make, but is it? Working out of your home has some definite advantages; it also has some disadvantages. If you are consulting and have made a decision about location, you may still want to read this chapter to determine whether you've thought of everything. For example, this chapter offers ideas about planning for your technical requirements, such as electronic record keeping.

Chapters Eight and Nine focus on finding and acquiring clients. This information is worth reading at any stage of your business—unless you already have more work than you can handle. (And if that's the case, you may want to read Chapter Eight, "Growing Pains," in *The New Business of Consulting*.) Marketing is a lot of common sense with a touch of creativity. Often simply reading someone else's ideas will remind you of what you knew all along but aren't practicing. These chapters will remind you again. Review the section about your website. Many websites do not do what's necessary to grab potential clients' interest.

Chapter Ten is a lifesaver—both figuratively and literally. Surviving your first year of consulting is as much about the work you do as it is about the way you run the business and the way you take care of yourself. There's good advice here no matter how long you've been in business.

Chapter Eleven helps you focus on year two. Although you may not actually complete these exercises if you are just starting out, you may want to peek ahead to see how you will be expected to assess your progress. Suggestions for reviewing your first year with your family make this chapter well worth your time.

In addition to the chapter content, you will find a dozen places that indicate Quick Start Actions. These actions go beyond the content in the chapter—beyond the basics. You can think of these ideas as "extra credit," like you had in school. They are additional activities that will give you an even quicker start. Tips are scattered

throughout the chapters that are hints to make something easier, or an URL where you can find additional information.

The material in this guide will no doubt stimulate other thoughts and ideas. You may capture those thoughts at the end of each chapter on the Quick Start Lists. Space is available for you to list the actions you'll take based on what you read, the ideas that were stimulated by the chapter, and the questions you need answered. These lists summarize the actions you'll need to take to move forward. A robust reading list and URLs that you can tap into to obtain additional information round out the book.

Welcome to the gig economy. Now let's get you off to a quick start so that you can experience why I say that consulting isn't about just making a living. It's also about making a difference.





# 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: