Consulting Issues and Solutions

From a Meeting of the Northwest Network, 5-16-2009

At this meeting, the participants responded in small groups to six issues selected by the whole group as being the most pressing. Each small group brainstormed solutions to each question. Following are the solutions offered by the groups.

Issue: Developing Better Sales Skills

Improve your knowledge of the sales process and skills

- Read books on the subject; e.g., The One-Minute Sales Manager.
- Take a class on sales skills. Attend a free or low cost sales course at Dale Carnegie (and go with other IDs to brainstorm afterward on applying what you learned to ID sales). Search online for virtual sales training courses.
- When meeting with a client, ask for the sale (job)!
- Brainstorm/prepare in advance on what objections may arise and how to counter them. Ask: “Is there any reason you can pinpoint that would keep me from working for you?”

Do both marketing and sales

- Learn about marketing, not just sales. Learn how to effectively market your skills.
- Have an expert review your résumé.
- Bring in a sales expert to NW Network.
- Connect with a good sales person for tips, advice, and feedback. Consult with Becky—she’s the best! See Becky…COS training.
- Accompany someone you deem savvy on one of their sales calls.
- Get recommendations on Plaxo, LinkedIn, I-Link, or similar sites.

Improve your presentation skills

- Have your 2-minute (or less) elevator speech ready to use anytime on anyone.
- Join Toastmasters to improve your presentation skills.
- Practice, practice, practice. Practice on friends. Write scripts. Set up scenarios and practice role plays. Use existing network for practice.
- Video tape yourself and assess the playback.

Increase the number of sales calls

- Cold calls—start with a targeted list and follow up repeatedly (it takes more than one meeting to develop a relationship and get a job).
- Keep a database of potential clients.
- At the close of contact phone calls, ask when you may/should call again and note the date in a tickler file. Then follow up at the appropriate time!
- Be confident. Make eye contact.
- During client discussions, repeatedly nod your head "yes." It's catchy.

Increase your customer focus

- Pay real attention to the customer's needs. Look beyond what they say to what they might really mean or need.
- Make a goal of building a relationship and being a partner, not just making a sale and being viewed as a service provider. Give the customer time and reasons to get to know you before trying to close a sale.
- Focus on the end benefit/value to the customer. Show the customer the value of your skills to them. It's all about THEM, not you. Practice customer-oriented selling.
- Probe current/past clients for their needs rather than assume you know what those are. (They may have changed in the current economy.)

Issue: Proposal writing in current economic situation

Deal with client wanting to spend less, get more, and get it faster

- Barter for options that work for both parties
- Offer tiered approach of services
- Acknowledge the current economic environment in the proposal
- Focus on the value of the work

Write a better proposal

- Start with a Statement of Work (SOW)—it is looser—"I understand the project/scope to be…" and a price range—keep them talking—then you have more time to learn the real scope and the price they're willing to pay
- Try to find out who the competitors are to know how to position you proposal
- Be really concise—clients time is too "put upon" to spend lots of time reading
- Checklist of risk factors to determine complexity of project (so the ID can determine scope)

- Be specific on deliverables, SMI needs, time factors, and anything else necessary from client
- Sell benefits of ID process
- Address the need/desire for prototype
- Meet all RFQ/RFP elements
- Provide “legal” language to assure client and avoid miscommunication
- Include references regarding project fulfillment
- Indicate repeatable processes and templates
- Tweak previous proposal

Make it customer focused

- Spend more time “really” defining what the customer needs vs. what they want
- Ask “why” is current cost of solving/dealing problem and what’s it “worth” to solve/prevent problem
- Remind/Reinforce the need which led to the project
- Be specific—list the beneficial business results
    - Identify measures to be used
    - Final outcome—behavioral and results

Price it right

- Make sure you can do it for your price and time
- Ensure your price is viable for you and client
- Research “going” rates
- Research clients’ expectations
- Hold your rate—instead, offer a negotiated amount of work:
    - If you do this part, I can pick up from there…
    - If you do the course materials production, it will save you money
- Write the proposal so it looks like they are getting more than the deliverable—end benefits to client/organization
- Emphasize “cost-benefit” or Return on the Investment (ROI)
- Be empathetic to their financial situation
- Ask about budget before writing proposal and then propose something that will fit in the budget
- Better off with “fixed price” or “ not to exceed” rather than quibble about hourly rate
- Add-on sales—offer a base project with options (bells and whistles go here)
- Lower the budget for the first project

Issue: How do we network when everyone in the training industry is either out of work or in fear of losing their own job, and we're their competition?

Differentiate your skills and experience

- Identify differences/complementary skills to focus on cooperation rather than competition.
- Ask for recommendations, especially in industries that are "tight."

Partner with others

- Join forces: "I'll look out for you and you look out for me."

Participate in professional groups: ASTD, ISPI, others.

- Ask for information: "What is going on in the industry?
- Ask for suggestions: "Do you have ideas for me?"

Network with the real clients

- Go to trade/industry shows.
- Go to professional association meetings for *industries*, not for instructional designers.
- Stay connected to professional groups and go prepared.
- Present at associations about how you add benefits to client/unit/company. Show how you make people look good.

Increase your own skills

- Attend online/virtual training, professional, or networking events.

Help others find work

- Help other instructional designers find work: pass it forward.
- Write recommendations, especially in industries that are "tight."
- Keep an eye out for projects outside your area of expertise, to share with others.
- Be aware of others' expertise.
- Provide help while networking: What can you do for them?
- Be generous and helpful.

Expand your horizons

- Think broader than "I'm an instructional designer and build training only..." What else can you do?
- Be creative about reaching out to new kinds/types of contacts.
- Build on hobbies or interest. Have secondary businesses.

Practice good networking

- Don't let the economy change how you network. You should <u>always</u> be networking.
- "Never eat lunch alone."
- Networking is something you need to do all the time, so don't abandon your contacts.
- Remind people you are around.
- Come to NWNetwork meetings!
- Make sure your e-mails are personal, not company.

Do pro-bono work

- Do volunteer work.
- Do pro bono work that is not too time-consuming. It could create work opportunities.

Locate target companies and people

- Sponsor your own networking event: rekindle contacts.
- Contact past employers/clients.
- Talk to/e-mail people you know and trust. Let them know your story.
- Contact former coworkers.
- Use the Internet. Research names and companies.
- Seek out organizations that you want to work with, so opportunities arise.
- Use social network and sites: LinkedIn, Facebook, Plaxo, FTwitter, Craigslist.
- Attend in-person social groups.
- Focus on industries that are either growing or haven't been as much compacted. Examples: auto industry (no), banking (no), health care (yes).
- Talk to everybody everywhere.

Issue: Doing whatever the client is telling us to do, rather than suggesting what should be done.

Recommend a better approach or product

- Offer pros and cons
- Talk about possible consequences of what they want to do.
- Use examples (show and tell, provide historical evidence) of why another approach might be better.
- Focus on problems.
- Ask client what their thinking/rationale is.
- Propose compromises.
- Explain your own reasoning
- Point out risks of not following the process.
- Send articles to client to educate them.
- Suggest needs assessment.
- Look for/work toward a compromise.
- Be proactive in suggesting ideas. Become seen as the subject matter expert in training.
- Probe, tactfully, for why this is their preferred solution.
- Relate changes to "a cost impact," "timeline issues," etc.
- Spend constructive time listening to one another's point of view.

Build on your own skills, knowledge, and experience

- Try to sell your past experience and knowledge as consultant.

- Apply your unique skills to their approach and make it the best it can be.
- Remind client that you know what to do: "I'm the expert."
- Increase credibility/relationship building. Long term, it will make it easier for your ideas to be heard.
- Be persuasive in a nice, respectful way.
- Remind them (nicely) that you are the expert (adult learning, instructional design).
- Cite your previous experience--"I've seen this happen," etc.--to illustrate the consequences.

Try to persuade client, but acquiesce to their demands

- Push back twice, then let it go. It's ultimately the client's project.
- Remember: it's their project. Their job is on the line. Once you've presented your ideas, you have to give them what they want.
- Don't tie your ego to <u>their</u> project!
- Remember: "The project is what it is"--even if you think it could be better.
- Document what you are doing, stating it is their approach.
- Let go. They're the boss. If they're happy, they'll be happy.
- Realize: there are many means to the end. Be more flexible.
- Use the "yes, and..." tag on an addition of your own to lean in the direction you think is better.
- Do best effort and shut up.
- Put in extra time and quality.
- Make sure you overserve.
- Manage professionally. Be perceived as professional as possible.
- Trust your client. Let your ego go.

Issue: Finding Projects

Work your sources

- Contact people & companies you used to work for
- Ask employees to get you “in”
- Tap past clients for leads, referrals, and references
- Make sure people know any new projects/new skills and that you are available
- Look for repeat business
- Maintain relationships
- Ask for referrals and references
- Possible Next Steps:
    - Create a list of past projects: include supervisor and client names, project costs and results, new skills developed or refined, lessons learned
    - Locate all former client contacts: sponsors, stakeholders, team members

Research new sources

- Check websites for companies looking for IDs and then contact them on your own as a consultant
- Look for tech minded companies that need skills
- Read full time ads and contact them to see if they want contract help
- Research companies with high turnover – good source of change management/org design work
- Read Crain's Chicago Business, looking for situations that need training – such as mergers and acquisitions
- Read good project oriented resumes online to see what kinds of projects are featured
- Do trend research and look for problems that you can solve
- Explore consulting firms
- Possible Next Steps:
  - Brainstorm list of situations that might be helped by training
  - Create solutions by mining your own experience for lessons learned or situations handled.
  - Collect names from research and connect through LinkedIn or Facebook

Subcontract

- Contact contract companies to see if the need ID skills, etc.
  - Cara
  - Hudson
  - St. Charles Consulting Group
  - Clarity
  - Resource Bridge
  - Training Partners Plus
  - PDASearch
- Search the Internet for training companies to contract to
- Look for recruiters that may have contract opportunities
- Possible Next Steps:
  - Collect contact names from LinkedIn and other sources
  - Share information with the NW Network on how various contractors treat employees, what they look for, how they mark up, etc.

Do pro-bono projects

- Help others with their projects
- Possible Next Steps:
  - Look for volunteer work that uses your skills in new ways and builds your resume
  - If you are volunteering, let everyone know what you do and what you are looking for, even if you don't think they can help

Network

- Network your "booty" off

- Send out a “heartfelt” email sharing stories and what you are looking for
- Attend networking events that are outside of your field
- Maintain a database of whom you’ve talked to, prospects, when to call back
- Find advocates for you in different and non-competing roles
- Continue going to your own association events
- Possible Next Steps:
  - Make sure your marketing messages are up to date
  - Research fields that you would like to enter

Make Web 2.0 Work for You

- Develop a desirable persona for Facebook, LinkedIn, Twitter
- Blog
- Write a newsletter
- Use the LinkedIn update feature
- Possible Next Steps:
  - Keep up with your professional literature and share knowledge & ideas with others

Update your resume

- Sample project portfolio
- Register at all the big sites
- Possible Next Steps:
  - Share results and experiences online with the NW Network

Other suggestions:

- Use online project resource
- Create a product

Issue: Loss of internal contact at client

Common Themes

- Preventive – Develop multiple relationships including project manager, supervisors/managers, stakeholders, content experts, the ultimate customer for your work, and dmins. Get their contact information.
- Contact the person who left at their new organization wherever they are.

Big Ideas

- Offer to do maintenance on a previous project to whoever is there now (I **know** the work…).
- Offer to write a recommendation for the person who is leaving.
- Keep your name on the materials in Properties and with “Designed by …” on the title page.

Prepare for possible loss of internal contact

- Plan ahead and have secondary contacts.

- Establish multiple relationships but keep a clearly defined “point person.”
- Recognize that loss of contact is always a risk; i.e., be prepared; build other networks
- Prevent this – build multiple relationships at each client.
- Cultivate people younger than you are (variety of ages).
- Try to avoid this problem – have more than one contact at your client.
- Maintain regular contact – call regularly whether you are looking for work or working on a project for that company.
- Get more names on the contract.
- Get a contact name of someone in authority in accounts payable in order to be able to collect for work done.

Get help from internal contact who left

- Contact the person that left the organization – get names at the company; call and make new contacts.
- Get recommendations / contacts from departing contact.
- Ask departing contact to put in a good word for you with those that remain at the organization.

Get help from remaining company people

- Contact the former boss to see if they have someone new to talk to.
- Contact others that you have a relationship with in the organization that knows your work/skills.
- Contact the “**actual**” customer for the final project.
  You → Training Department → Receiver of final product
- Request meeting with other stakeholders.
- Offer to do maintenance on a previous project to whoever is there now (I **know** the work…).
- Get to that contact’s manager.
- Consider admins as contacts. Ask them, who is taking X’s place?
- Don’t assume that possible new contacts / clients are fully briefed.
- Act quickly – get to new person and introduce yourself and get them up to speed (on the proposal, project value, etc.).
- Preventive – meet others connected with the project, peers, supervisor, content experts.
- Network to get contact information – email, telephone numbers.
- Get organizational chart with contact information so you can contact the employee’s supervisor and others.
- Keep your name on the materials:
  - In the properties
  - “Designed by” on title page, etc.
  - If there is resistance to your name, you may be able to negotiate for it if they ask for any

Pursue contact’s new organization / company as a client.

- Find where the person went – if they are now employed elsewhere, you have a new company to tap through that client.

- Stay in touch with the person. If they've been downsized, offer to write a recommendation – they will **love** you for it (and they'll remember you when they've settled elsewhere.)
- Even if contact leaves, stay in touch; they may have internal contact to refer you to and it may open another door for you in a new organization.
- Arrange face-to-face, if possible, **ASAP!!**
- Make your resume available to new client / contact, so they are familiar with your work / expertise so they have confidence in you.
- Follow people to other companies.
- Stay in touch through Linked In.

Establish new contacts from scratch

- Go through professional networks and social networks for other contacts.
- Brag about what you've done.
- Assure client of your change management skills.
    - economic concessions such as a lower rate or free revisions.