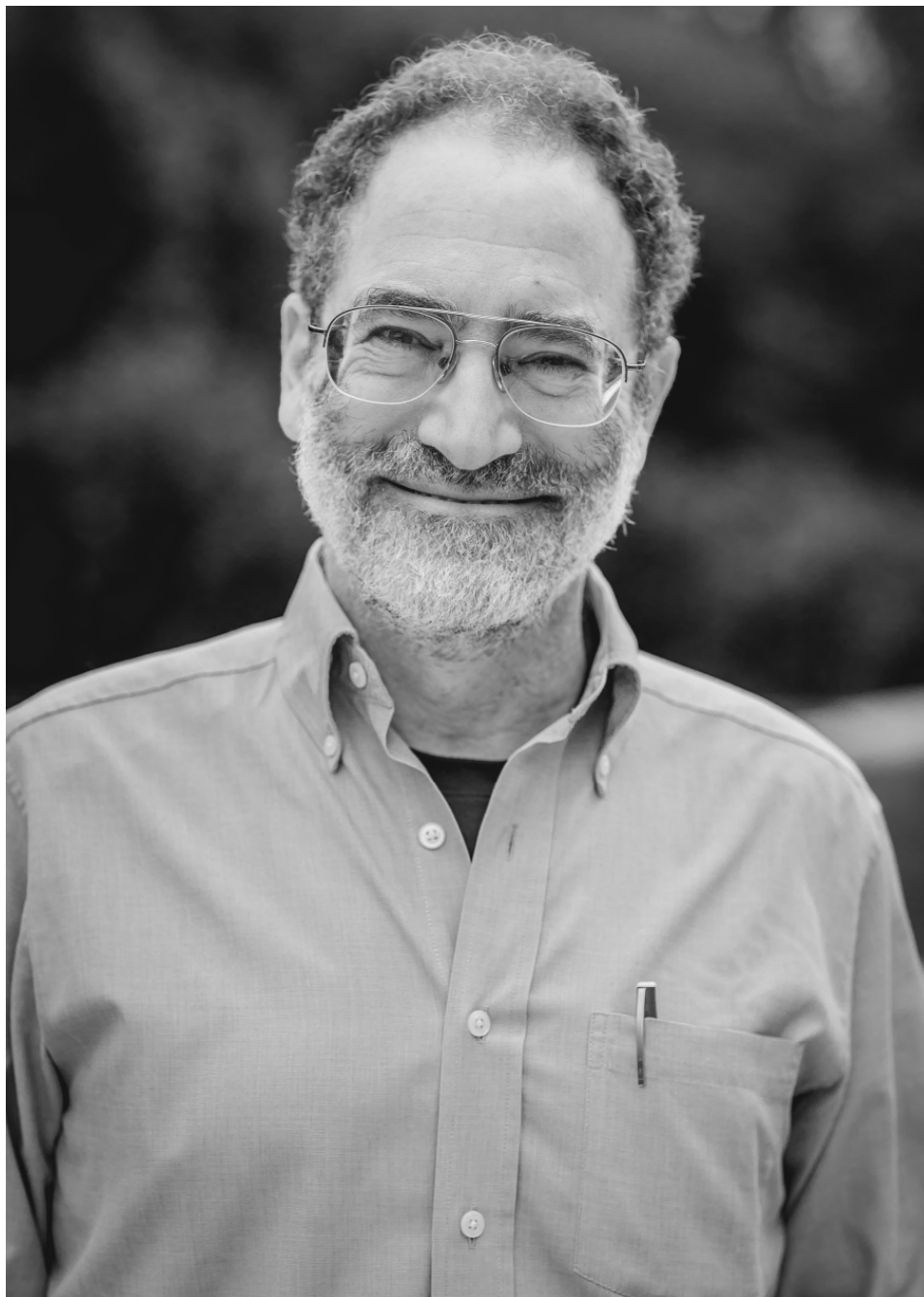




So You Want to Be a Consultant?



Welcome!

I'm Andy...

Author, trainer, board
chair, and the Swiss
Army knife of
nonprofit consultants

Poll 1: What's your situation?

- Consulting is my primary work
- Consulting is a side gig
- I don't have a consulting business yet, but I'd like to learn more
- I think consultants are rock stars and I just want to hang out together



We'll discuss...

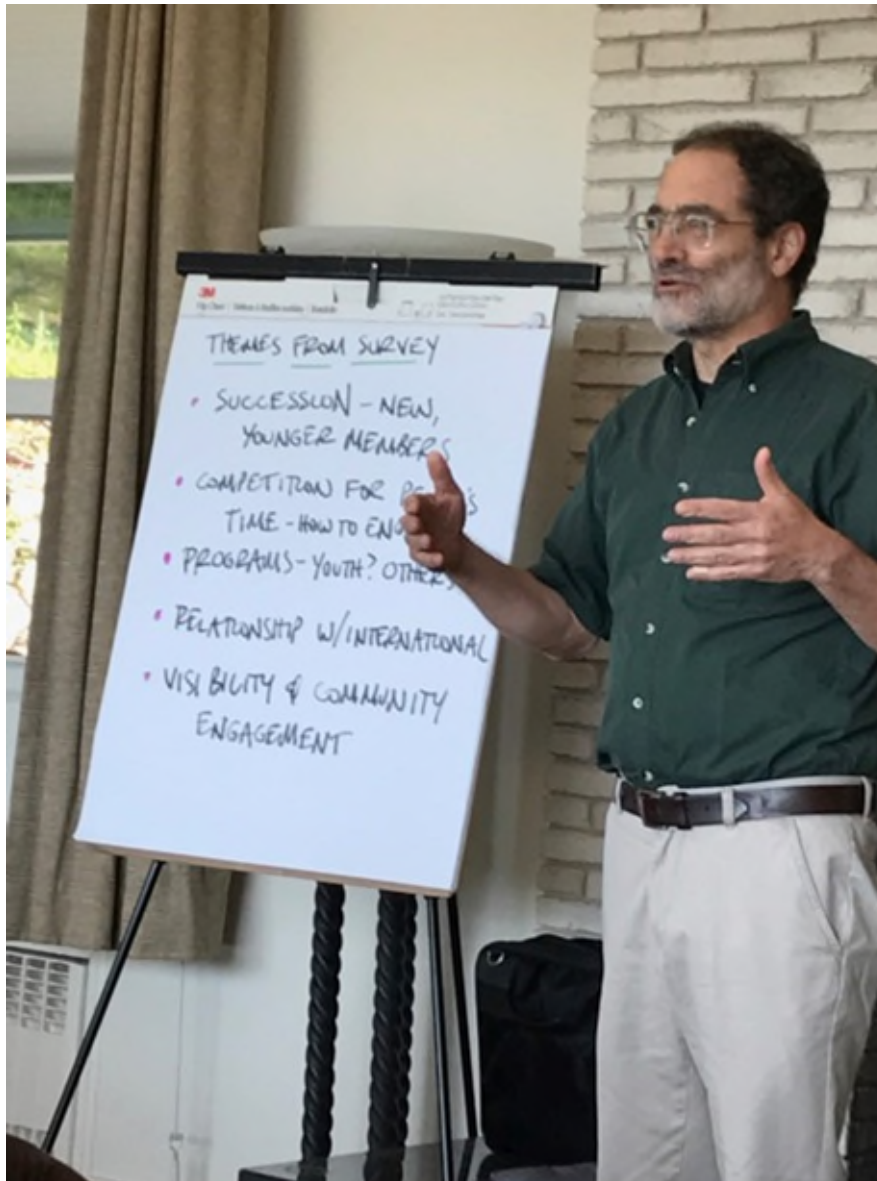
- Structuring your work
- Developing services
- Marketing your services
- Bids and contracts
- Managing your business
- Building client relationships
- Working with peers





Breakouts 1: **Where are you now?**

- Are you currently a consultant, trainer, or facilitator ... or considering it as a career?
- What do you want to learn today?



My origin story:
How I left my job
and started my
own business

**Who do you
want to be
when you
grow up?**



What's your vision of your consulting practice?
Start by thinking about the business model...

5 ways to structure your work

- By the project (my preference)
- By the hour; could be open-ended
- As contract staff (know the legal limitations)
- On retainer
- Passive income

You'll also need to consider your legal structure: sole proprietor, LLC, C-Corp, etc.





Developing a suite of services

A mix of factors...

- What's your skill set?
- What do you enjoy doing?
- What do you want to learn?

A mix of factors...

- What do you have the credibility to offer?
- What are your sectors of expertise: nonprofit, government, business, philanthropy, education, etc.?
- *Demand*: What are potential clients asking for?
- *Money*: How much can you reasonably charge? Will it be profitable? What's the ROI?



Your odds of success improve when you
Offer a variety of services

Three overlapping competencies

- **Training:** Teaching skills to others
- **Facilitation:** Working with groups to support inclusive decision-making
- **Consulting:** One-on-one and small group coaching and support

A full-service consulting practice offers all three skills and services!

Poll 2: What do you offer now?



- Training
- Facilitation
- Consulting
- At least two of the three
- All three
- Not applicable

Marketing your business



- Get a website!
- Peer referrals
- Third-party influencers (nonprofit centers, funders, nonprofit leaders, etc.)
- Write: blogs, social media, articles, books
- Conferences and professional associations
- Videos
- Training generates consulting work



Training as marketing

- An opportunity to showcase your expertise
- Client development: *Someone* in the room will seek you out for individual work



The number 1 strategy:

Word of mouth!



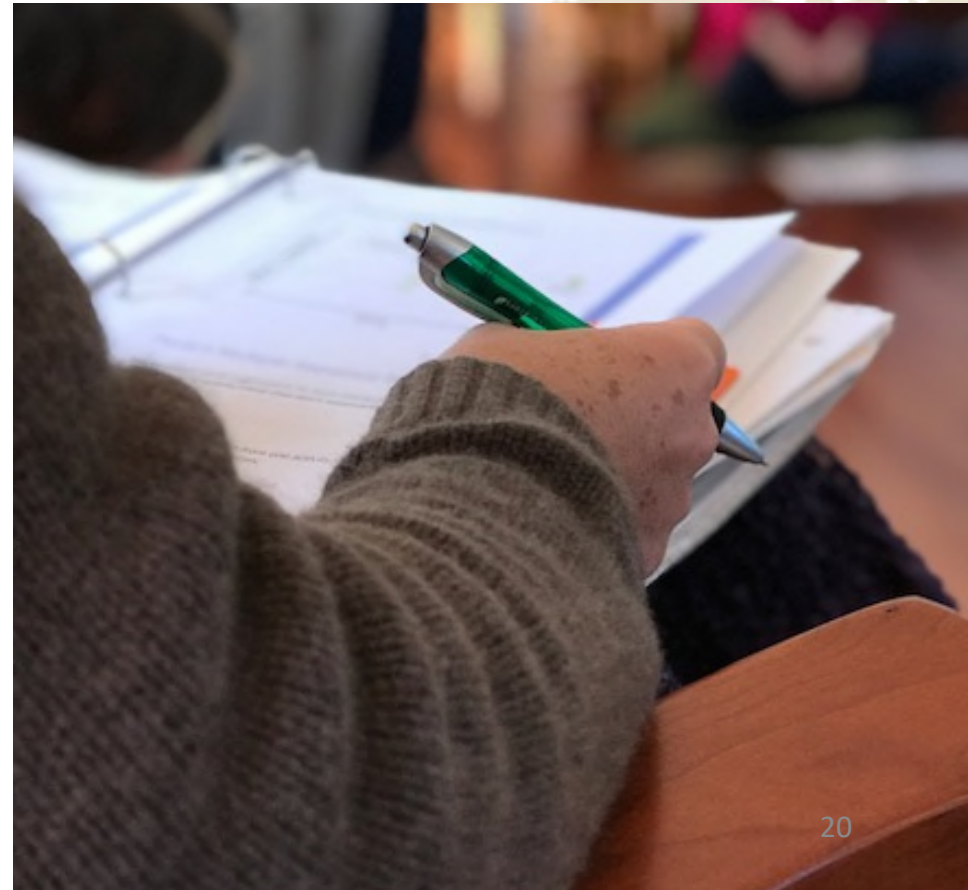
Pay attention to
Building your network



What are your active networks now?
What networks do you want to reach?

When preparing bids...

- Ask about the client's budget for the work they want
- If possible, scale accordingly
- Estimate your hours and use that to build the bid



Sample (simple!) bid and contract



TO: Actual client

FR: Andy Robinson

RE: Bid for conference presentation, March 2018

Contractor will:

- Provide promotional language, photo, etc. as requested
- Work with client to develop agendas
- Provide training materials in advance for photocopying and e-distribution
- Facilitate two breakout sessions during the conference; also provide “speed consulting” with individual land trusts as the schedule allows

Client will:

- Handle logistics: venue, photocopying, flips charts, projector, registration, etc.
- After the event, provide contractor with a registration list of all attendees, including email addresses
- Make payment within 30 days



| | |
|----------------------------------|----------------|
| <i>Training fee</i> | <i>\$2,000</i> |
| <i>Prep fee</i> | <i>500</i> |
| <i>Estimated travel expenses</i> | <i>1,000</i> |
| Total | \$3,500 |

Overage: This bid is guaranteed plus or minus 10%.

Managing your business

- Set up a separate bank account
- Get an EIN – optional but a good idea
- Pay quarterly taxes; talk to an accountant
- As you're starting, find an "anchor client" (your former employer?)





- Bid on multiple jobs – not every bid lands
- Assume that **one-third of your time is billable**, so set your rates accordingly
- Consider professional liability insurance
- Invest in professional development

Let's talk about money!



Calculate your earnings goal:

2-3 times what you need to earn as an employee

Considerations:

- Billable and non-billable time
- Taxes: Self-employed = higher tax rate
- Health insurance
- Business expenses, office, insurance, travel
- Marketing and professional development
- Retirement savings
- Vacation and personal time



How much can you earn?



Building client relationships

When working with clients...

- Skip the jargon – speak plainly
- Listen deeply; be compassionate
- Clarify who does what
- Negotiate the nagging
- Be fearless: tell the truth





“The consultant should never work harder than the client.”

-- Sharon Behar



Accept that consultants can do good work
and clients can still drop the ball

You can't make everyone happy



Working with peers

- Discuss how much prep you each need
- Divide up roles, then adjust on the fly
- Trust your partner!
- Check in often
- Learn from each other – because we are smarter in teams



Identify and develop a peer consultation group

When you need advice or a consultation on a client or project...who do you call?

Can be informal/as-needed, or more structured...

A yellow sticky note is pinned to a white surface with a red pushpin. The note has the word "Questions?" written on it in blue. To the right of the note, there is a faint, light-colored shadow of a tree. The entire scene is set against a white background with a blue vertical bar on the left side.

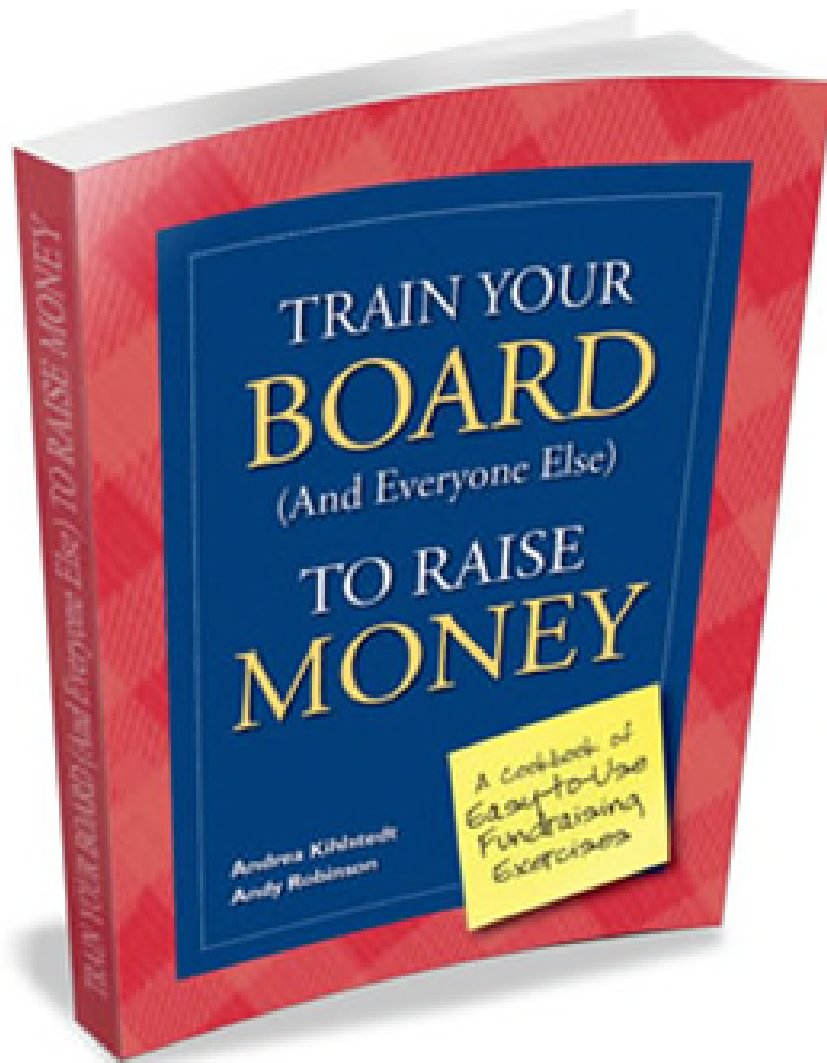
Questions?



Breakouts 2: Action Planning

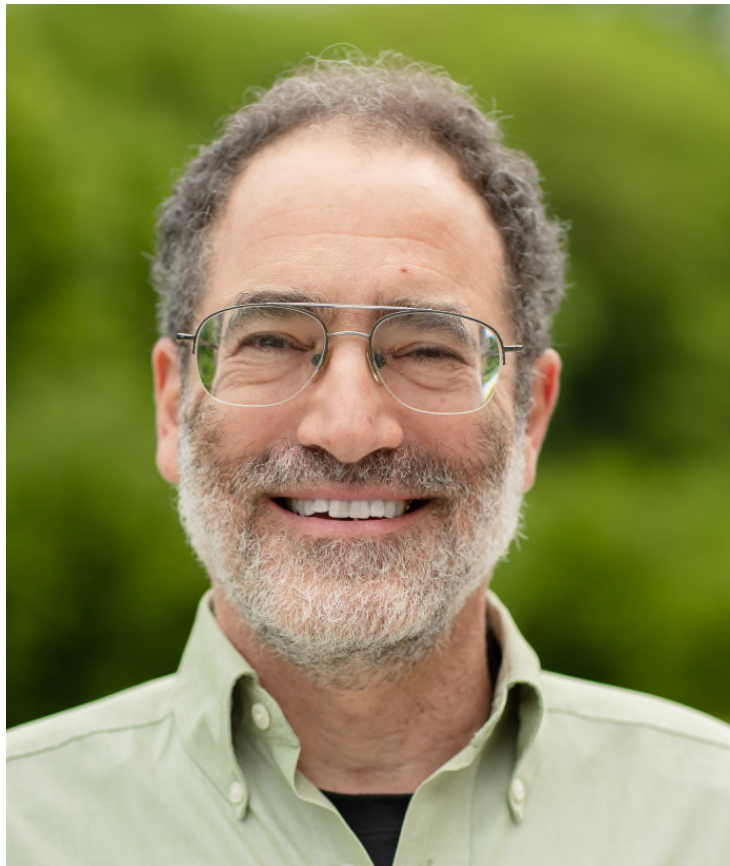
How will you
implement what
you've learned today?

Share one action step



Andy's book – with Andrea Kihlstedt

Available from
[https://hilborn-
civilsectorpress.com/](https://hilborn-civilsectorpress.com/)



Thanks and stay in touch!

www.andyrobinsononline.com

www.trainyourboard.com