

Chat Transcript – So You Want to be a Consultant?

Comments/Questions:

From Danielle Kempe to Everyone:

Just set up my LLC after a few months of nonprofit fundraising consulting

From Becky Kates to Everyone:

two questions: 1. how in the universe do I figure out how many clients I can handle at once? I just keep saying yes. 2. without the built in structure of working in an office with others, how do you motivate to work instead of... read, or garden, or nap?

From Mary Cockram to Everyone:

Replying to "two questions: 1. ho..."

Deadlines motivate me to let the weeds grow in the garden...

From Becky Kates to Everyone:

Replying to "two questions: 1. ho..."

Right? I feel like I'm so conditioned to work in Triage mode from working at nonprofits for so long, I seem to only work on things that are currently on fire. Not the best way to run my business

From Becky Kates to Everyone:

What do you use to keep track of all your clients and their projects/tasks?

From Danielle Dolan to Everyone:

Replying to "what do you use to k..."

I like project management apps like Monday, Asana, Trello - most have free trials and/or nonprofit rates

From Becky Kates to Everyone:

Replying to "what do you use to k..."

I've tried Trello and Asana, but they don't quite work for what I'm looking for. I'm currently looking at ClickUp

From Erica Crowley she/her to Everyone:

Replying to "what do you use to k..."

Big fan of Notion <https://www.notion.so>

From Mary Mahoney to Everyone:

Replying to "what do you use to k..."

Would recommend notion

From Betty Reece to Everyone:

It's the 'what to charge' question for me. How would I put a price on a somewhat niche service?

From P. Todd Pickens to Everyone:

QUESTION: Is it best to offer a broad array of services or to focus on a few to reach potential clients?

From Danielle Kempe, CFRE to Everyone:

I am a nonprofit fundraising consultant that loves project based storytelling work - Giving Days, specific project fundraising campaigns, appeal writing. My favorite clients are "small but mighty" - especially in the disability space. I charge flat project fees - NOT hourly

From Terry Grady to Everyone:

Some you can schedule 1-2 months ahead when others conclude

From Kiko Ichishima to Everyone:

How do you market oneself as a generalist? This has been my million dollar question...

From Mariah Kurtz to Everyone:

Replying to "How do you market on..."

I'm at the beginning of my consulting career, but so far, I've marketed myself as a specialist, but offered more than that. They find me as a grant writer but once I'm working with them they realize I can do more than that.

From Yasmine Ameli to Everyone:

Can you please explain the difference, as you see it, between training and facilitation with an example?

From Rachel Ross to Everyone:

You don't want to be a generalist though right?

From P. Todd Pickens to Everyone:

Several years ago, the New England Nonprofit Consultant Directory changed its format to limit the skills and services a consultant is able to list. I wondered then and wonder now if that is a good thing.

From Sarah Shrewsbury to Everyone:

P. Todd Pickens. I wonder the same about the NE Consultant Directory. I'm always confused why certain consultants show up at the top of a list with the least experience in that specific area and others with great demonstrated depth in that area show up in the middle.

From Meher Shulman | Hartford Foundation to Everyone:

The New England Nonprofit Consultant Directory is a free resource to help nonprofits and consultants to connect - neconsultant.org. The consultant directory allows consultants to link to their website, social media, etc., if there isn't enough room for you to include all your information.

From Emie Michaud Weinstock to Everyone:

Can you talk about the types of professional development to use to build skills in the 3 competencies?

From Danielle Dolan to Everyone:

Those of you who experienced an unexpected job transition, and don't have a 2-year lead-time like Andy, take heart! You can make it work, too! I got my business up and running in 3 months, and am now at full capacity!

From Michaela Fissel to Everyone:

Question: how do you "cultivate" people to say nice things about you?

From Mary Cockram to Everyone:

Replying to "Question: how do you..."

And, do good quality work. Make sure they're happy

From Joel Rosenberg to Everyone:

Is your work today a blend of in person and online, or primarily one vs the other?

From Sarah Shrewsbury to Everyone:

Joel Rosenberg almost all online but occasionally in person when necessary and I like it that way. Saves a lot of time!

From Becky Kates to Everyone:

Replying to "Is your work today a..."

Blend. If they are hyper local, then I meet with them at a coffee shop or library. Everyone else is online.

From Becky Kates to Everyone:

I know how to be a fundraising consultant, what I DON'T know is how to run a business. I swore I would never own my own business and specifically did not learn those skills. Taxes, what? Cash flow huh? I have a tax consultant now, and I use Wave as an accounting software (free), but I don't know what I don't know. Actually, I also know what I don't know how to do because I'm facing that too. Where can I get a crash course on consultant business training (SCORE, SBA, are sort of helpful but are always geared to people consulting for big for-profits)

From Kelly Baker to Everyone:

Replying to "I know how to be a f..."

I found books to be pretty helpful- consulting for dummies, freelancers bible.

From Becky Kates to Everyone:

Replying to "I know how to be a f..."

Oooh. Honestly consulting for dummies wasn't even on my radar. Thank you!

From P. Todd Pickens to Everyone:

LinkedIn profiles allow one to ask for recommendations that are included in the profile.

From P. Todd Pickens to Everyone:

I wish organizations would include a budget cap or range when they send out RFPs. It's only fair and reasonable in my opinion, and saves everybody a lot of time.

From Meher Shulman I Hartford Foundation to Everyone:

Agreed, Todd. We always advise nonprofits to include their budget in their RFPs so that the consultant knows how to write a proposal.

From LaTasha Williams to Everyone:

Do you ask about clients budget prior to giving them a proposal/bid? What is the best practice around this?

From Meher Shulman I Hartford Foundation to Everyone:

Yes, LaTasha - I think Andy was suggesting that consultants ask clients about their budget in advance.

From Becky Kates to Everyone:

Do we need an indemnity clause in our contracts? Do we need to get insurance?

From Nam Dinh to Everyone:

What is your recommendation for insurance coverage & limits?

15:30:18 From Michele Walls to Everyone:

I just renewed my Errors and Omission insurance through State Farm. It's good to have.

From Mary Cockram to Everyone:

Replying to "What is your recomme..."

Public sector clients will require insurance

From Thomas Phillips to Everyone:

My firm has both Commercial Liability and Professional Liability policies that costs \$1,250 annually.

From Stan Simpson to Everyone:

What to do when you lose an anchor client?

From P. Todd Pickens to Everyone:

I have found organizations often send out RFPs as a means of trawling for free work from consultants.

From Emie Michaud Weinstock to Everyone:

Sometimes I've found that orgs don't know how to work with a consultant and want to make the consultant their employee. Or the org's employees try to bring in the consultant to org politics. How do you deal with that?

From P. Todd Pickens to Everyone:

I have found in my nearly twenty years as an independent consultant in Greater Hartford that many organizations here are reluctant to hire people of color and men for projects, even DEI work. That is a problem for me since I am a Black man. What are your suggestions and thoughts about that, Andy?

From Thomas Phillips to Everyone:

How have you dealt with client SOW creep?

From Rachel Ross to Everyone:

You mentioned sticky situations with clients...how do you get past a bad client experience?

From Evelyn Francis (she/her) to Everyone:

Question: are there special administrative/financial needs when you work remotely across state lines?

From Mariah Kurtz to Everyone:

Do you have tips for gracefully backing out or renegotiating a project when you realize there is a large client/consultant expectation mismatch after you've already started a project?

From Marie-Frances Rivera to Everyone:

How do you avoid people wanting to "pick your brain" for free. What's the fine line between relationship building/prospecting and someone getting free consulting?

From Justin David (he/him) to Everyone:

A question - what does Andy think about "branding" as a way to let the world know about our services, approach, philosophy, etc?

From Adrianna Ramirez to Everyone:

Choose my first service to provide and start with word of mouth.

From Mary Cockram to Everyone:

Who wants to do an informal gathering, monthly or whatever?

From P. Todd Pickens to Everyone:

Setting up a website is great. It's a space where you can highlight your brand.

Resources:

From Danielle Dolan to Everyone:

For the folks in my break-out group, or anyone else from the greater-Boston area, this is the Nonprofit Consultants Network I shared about: <https://nonprofitconsultantsnetwork.org>
Well worth the membership fee!

From Paula Pierce to Everyone:

Oh, I just thought of something else that might be helpful for people here -
CareerPowerUp.com for optimizing your LinkedIn profile. My friend Pam is a fantastic resource!

From Becky Kates to Everyone:

I had a great experience with a web and graphic designer who designed my logo and website. It's called You're A Big Deal, small operation, women owned.
<https://www.youreabigdeal.com/>