
Taking on work

BCS Consultancy SIG mentoring

How to be a consultant, episode 4

Marketing and selling what you do

Colin Butcher CEng FBCS

Introduction

This talk is intended to share some non-technical experiences from the past 25 years or so of running a consulting business.

The intention is to help other people, especially in these uncertain times. I hope it's useful.

My business has been leading systems and infrastructure projects, many of them involving VMS based disaster-tolerant systems. It's technically complex and demanding work with a high level of responsibility. I prefer to describe myself as a “consulting engineer”, not a “consultant”.

What is “consulting” ?

- Problem solving in one form or another is at the heart of what most people in business actually do.
- Consultants usually get asked in when things are complicated and difficult. It's never the easy stuff!
- You're there to help them find workable solutions to their problems. Teach as you go.
- Consultants are outsiders. That affects how people will behave towards you, especially under stress.

The importance of your “duty of care”

- All projects come with responsibilities.
- What are your responsibilities, what are the client’s ?
- Where are the boundaries and how can you define them ?
- Understanding your “duty of care” brings clarity and helps you make decisions.
- Explaining your “duty of care” to the people you will work with can help to build a rapport with them.

Some hard questions!

- What motivates you to be a consultant ?
- What do you do that is unique to you ?
- Why should anyone hire you to help them ?
- How do people know that you exist ?
- Who can you offload work to if needed ?

The brutal reality

- Don't expect to be in paid work all the time.
- Be well prepared - use slack time to work hard on stuff that you don't like doing.
- Recognise that pre-sales activity is essential - and don't expect it all to pay off.
- Realise what's happening to you mentally - you will experience highs and lows, often in the same call!

Enabling work to find you

- What kind of person are you and how much effort are you prepared to put in ?
- Do you want to overtly sell what you do ?
- Would you prefer clients to come to you ?
- Use the power of trusted recommendations – the best person to sell what you do is usually someone else

Marketing – becoming known

- What are you really interested in ?
- How can you become known in your field ?
- Willingly share your expertise to help others
- Reputation, ethics, values, track record, etc.

“The trusted advisor” – Maister

“A passion for excellence” – Peters

Turning it into business

- Can you explain what you can do clearly and succinctly ?
- Can you make it relevant to other people in terms that they understand ? Then they can trust you to help them.
- Pre-sales activity – where is the boundary between pre-sales and chargeable work ?
- People deal with people, so don't hide behind technology. Meet in person if you can. Use the phone if you can't.

Initial discussions

- Why have they got in touch ?
- What level of pain do they have ?
- Who are the key decision makers ?
- What factors really matter to them ?
- How likely are you to get the work ?
- Do you really want to be involved ?

Are they serious ?

- Have they already got a preferred supplier ?
- Is there a workable description of what's needed ?
- Will they collaborate on creating the SoW ?
- Breaking a project into stages reduces risk on both sides
- Will they fund a short investigative stage up front ?

Key questions at the outset

- Do you want to get involved with *this* project for *this* client ?
- Will you be able to make a worthwhile difference *this* time ?
- Do you like them ?
- Is it interesting enough ?
- Do you think they are capable of what they want to do ?
- Are you prepared to carry the responsibility ?

Do you want to take this on ? (3x2 matrix)

	Crisis	Normal	Planning ahead
Value driven	Probably taken by surprise	Need help, soon	Understand value of early involvement
Cost driven	Beware conflict	Less likely to understand issues	Probably "just looking"

Can you help them?

Clarity of purpose

- Initial discussions
 - Proposal and negotiation
 - Statement of Work
 - Terms and Conditions
 - Costs
-
- Budget and schedule need to be realistic
 - Fixed price project based work
 - Limit risk for all parties.
 - Commitment from all parties is essential

Planning and implementation

- Estimating and planning are key
- You cannot know everything up front
- Make effective assumptions to get started
- Beware assuming that everything will go well
- Cumulative discrepancies add up very quickly
- How will you monitor progress ?
- What control do you have, if any ?

“More software projects have gone awry for lack of calendar time than all other causes combined.”

“The mythical man-month” – Brooks

Procurement and responsibility

- Procurement – both sides must do enough work up front:
 - It's not just about cost
 - Understand what is technically feasible
 - Understand what is strictly necessary
 - Clearly establish the scope
 - Define clear objectives
 - Define clear acceptance criteria
- Avoid split responsibility
- You can't take responsibility if you don't have authority

Delivering the goods

- Clearly establish the contractual boundaries for the work you undertake
- Clearly identify the criteria for successful completion and payment milestones along the way. Get paid on time!
- Pay subcontractors and suppliers on time. Cash flow is a lot more important as your business grows.
- All you need is a reasonable number of good customers

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