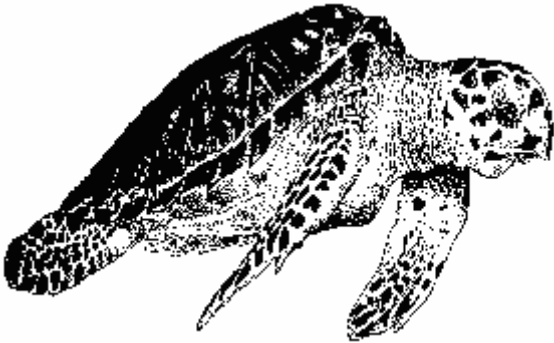


The Pocket Guide to
**Successful
Consulting**



Includes the
10 Consulting Commandments

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Pocket Guide To Successful Consulting

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Preface

The intended audience for this pocket guide is current or future independent contracting and fulltime consultants looking for proven on-the-job techniques to help them gain an advantage in the workplace.

Today's market is volatile at best. The instability of positions, hourly rates, and emerging technologies make it very difficult to stay employed and guarantee a new project when the time comes to roll off.

This guide illustrates how to keep an edge in the marketplace by demonstrating how successful consultant's network, study future trends, and ultimately stay employed. The emphasis is on the IT market, but these techniques can be applied to all industries.

Acknowledgements

The knowledge gained over ten years working with top consultants in several industries on top projects has been summarized into this handbook. Without this interaction with my leaders and peers, this handbook would not have been possible.

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Becoming a Consultant

Where to Begin

Getting your start in consulting can be an overwhelming process. You may already be a consultant, but want to change industries or skill sets. If you fit into either of these categories you'll need to determine what industry, applications, and supporting tools and software to purchase and how to become proficient at them.

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Training

You may need to take several training courses and obtain certifications just to get your foot in the door. The cost of breaking into a consulting career can be an expensive venture.

That being said, the easiest way to begin your consulting career is to talk to as many people in your field of interest as possible.

Tools

An excellent tool to begin your quest is [linkedin.com](https://www.linkedin.com). Most consultants have a profile and you can contact them for no charge.

Making It Happen

Many consultants have become what they are by a series of events often involving luck or by being in the right place at the right time. Opportunities are plentiful even in economic downturns and unstable markets.

Where To Begin

Determining your goal is the best place to begin. Most people begin with these two requirements:

1. Making as much money as possible
2. Enjoy my job

It can be easier than you think to achieve both of these goals with a significant amount of research and networking. People generally want to help each other and are more than willing to share their advice, experience, and tips for success.

The hard part is applying what you've learned and following through. I've been approached by many people asking how they can become a consultant in IT and where to begin, but few have followed through and applied the advice.

The best advice I can give is to read everything you can on IT if you'd like to become a computer consultant. There is an ocean of positions in the IT world and a huge variety of specialties within each area. Many appli-

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cations can have several specialties with them as well.

In the IT world it can be helpful to pick an area of study. You could begin reading on databases, networking, programming, or even project or executive management. Many times the decision to go into one of these areas happens over time and after years of experience. Most consultants will begin in the “trenches” as a programmer, DBA, network engineer, or in a customer support role.

An entry level position can often be the fast track to becoming a successful consultant with a little up front research. For example, some of the highest paying consulting contracts are as SAP consultants. In order to learn SAP and become a viable marketable candidate, a good place to start is in a supporting role for SAP or surrounding technologies. Once you're onsite determine what roles pay the most or sound the most enjoyable for your lifestyle and interests and begin to network with these consultants.

Where To Begin

Many could be found on linkedin.com and would be happy to help others break into their industry.

Read as much as possible and begin networking as soon as you can. You'll learn more from people than from any book and you may become the teacher before you know it.

Your Resume

Recruiters and employers looking at resumes have very specific roles to fill, so make sure that the title for your resume is for a very specific role and your skills match this role. If you are going for IT positions, these roles can be easily determined by going to dice.com and search for IT positions in your city or state. If you don't know what to search for try a search for SQL, UNIX, or XML since many positions have these as secondary skills. Many IT roles will be brought back and some will have salary information that you could use to determine if the position meets your personal goals.

My resume has "Websphere TX and BizTalk

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Consultant” as the title. This is a very specific role that managers with a need will know exactly what it means.

Don't use too many words in your title. You may have experience in many secondary skills, but your title should be one or two words followed by Consultant, Manager, Developer, Architect, DBA (database administrator), Engineer, etc. For example, Oracle DBA, Seibel Consultant, Healthcare Project Manager, Web Developer, SOA Architect, .Net Developer.

Easiest Way to Set Up a Business

Doing corp-to-corp as a sole proprietor is the best way to go if, as in most cases, you're not going to be the next Microsoft. Even if you decide to hire employees or out-source work to other independent consultants you can still set your company up this way following these simple steps.

Step 1. Think of a name for your business.

Where To Begin

Step 2. Get an EIN with this business name at this address:

<https://sa2.www4.irs.gov/modiein/individual/index.jsp>

Step 3. Get a business account at the bank where you have your personal banking. I switched to Wachovia because my bank didn't offer business accounts. To open the business account they need the EIN; this is the only reason to have the EIN. You'll use you SSN for filing taxes just like normal since you'll be a sole proprietor. When you file your taxes don't use the EIN on any documents. If you have to fill out a W-9 form, use your SSN number since that's what you'll be using to filing your taxes.

Step 4. Find a job, get paid, and deposit checks into the newly created business checking account. Note: You may have to wait three weeks for the checks to clear.

Step 5. Keep your receipts for everything and keep them in three categories: travel (rent, hotel, flights, mileage), supplies (lap-

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tops, jump drives, LCD TV's), and food. Surprisingly food is a very small portion of the right offs. You can add up all your meals, but then you have to divide by two. For many people, mileage is the largest right off. It's a good idea to have a separate credit card for your business purchases.

Step 6. Estimate taxes on a quarterly basis. If you're not sure what to pay, \$3000 for every \$50/hr you're making is a good estimate. For example, if you're making \$75/hr you would pay \$5000 per quarter.

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The 10 Consulting Commandments

Over the past ten years I've learned to find work, stay employed and, more importantly, be rehired again and again. I have full confidence that I could return to any client and be offered a position if they had openings.

With the help of my colleagues over several years on many projects great and small this list of advice has been assembled.

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1. Do Good Work

No one is perfect, but covering all of a client's requirements is expected and mandatory. If you need help, don't hesitate to call upon your teammates. Many projects evolve over time and requirements are constantly changing, but as long as issues are raised quickly, are addressed by the responsible party (SME, functional team) you will be covered. Document these issues as they come up and write them to a log accessible by the client (preferably web based). Communication is critical in fulfilling your client's expectations.

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2. Complete Your Work on Time

Completing your work in a timely manner is critical. It's much better to over estimate and complete your work ahead of schedule than it is to miss your deadline. Many entry level employees make the mistake of being overly optimistic thinking it makes them look better to be able to complete their work in one week rather than two, for example. However, when unexpected events out of you control cause dates to slide it can impact an entire project and put large amounts of unnecessary stress on you and your teammates. Communication is critical in meeting deadlines. Determine when email is suitable vs. when a meeting is necessary.

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3. We Not I

A controversial topic in the consulting world is when to take credit. My own personal belief is that your work should speak for itself and all emails should use "we" instead of "I". The exception to this rule is if you've made a mistake. If you need to explain a mistake you've made it's better to exclude your teammates from sharing the credit of your failure. If you've proven yourself to be a valuable team member your teammates will stand behind you. When you've done a good job and your work has been completed on time you have simply it's nice to get a pat on the back but your job is to complete the tasks given to you and make your team lead, manager, etc. look good by doing good work on time

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4. Just Say Yes

Being a good contractor means being very flexible with your time. There is a direct correlation between your willingness to work late, on the weekends, and other off hours to the appreciation your leads and managers will have for you.

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5. You Are Here To Make Friends

It's all about networking and there's no better place to network than on a client site. Ask your co-workers what experience they have and what projects they worked on before. Many industries use common applications so it's not usual for you to have worked on the same project or at least know some of the same people. Chances are you'll be working again with some of the same crew, so it is important to make friends and to get along with everyone. The people you work with now may be on a future project and have decision making power. A powerful tool to increase your network is linkedin.com. Make your profile available on linkedin as soon as possible and you'll be connected with hundreds of people before you know it.

10 Consulting Commandments

6. Share

When you come across something that gives you an advantage as a consultant, share the experience, knowledge, or software with those who can return the favor. You may not know who's in a position to return the favor, so it's better to share what you know with colleges on your current or past projects you feel would gain from it. Some examples are sharing knowledge about projects looking for consultants, rates to help them negotiate, software that may be difficult to get a hold of, and your personal contact list.

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7. Don't Fall In Love (with artifacts)

Whether you're writing code, a project plan, or a PowerPoint presentation it's good to keep in mind that these artifacts are usually dynamic, will be a team effort, and may be reassigned to another consultant just as quickly as it was assigned to you. It can be tough to let go of something you've poured all your energy into for weeks, months, or even years, but if it has kept you employed during this time your mission has been accomplished. If your work is reassigned or broken up by your leaders assume they have a good reason even if it doesn't seem logical to you. All that matters is that they have a good reason for it and don't take it personal. A good example of what not to do is when a co-worker disagreed with their leader's decision to reassign work and began to express opinions about the decision openly at work.

10 Consulting Commandments

8. Leave Your Ego at the Door

As a consultant, your mission should be to serve your clients and keep their best interests in mind. Employees and your leaders have the right to have egos, but contractors should not let their egos get in the way of staying employed, serving the client, and helping your leaders accomplish their goals. A good example of this is when a team leader decides to reassign work when he or she feels it is either not being done up to par or if a better resource for the task becomes available. This can create tension for the team and bruise the ego of the party who has been removed from the task. If you are the party receiving the bruised ego, try not to let your emotions get the best of you. At the very least, don't show anger or outward discontent. It's better to roll with the decision and move onto the next task at hand.

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9. Be Switzerland

When it comes to religion, politics, and rates (salary), leave your opinions and gossip at the door. It doesn't have a place in business and discussions on these topics, even off the client site, can lead to problems. It's much better to be neutral on these three issues when you're on the job for obvious reasons. People are very passionate about religion and politics. At the time of the writing of this book, politics is one of the top topics around the water cooler. Obama has just secured the Democratic nomination and McCain appears to be equal to the task. Giving your opinion on the matter is not a good idea. Giving too much information about any of these three topics can lead to resentment and cause unnecessary stress among you teammates.

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10. Be Invisible

One of your goals as a contractor should be to not be known by upper management. Upper management will usually only know you by name if there is a problem. Problems with critical code can be escalated to upper management and often get visibility at the VP level. Issues with administrative tasks such as disagreements with expense reports or timesheets also get visibility with upper management. Try to minimize this visibility whenever possible, but own up to any mistakes you've made. If there are minor disagreements with expenses, graciously let them go. Arguing over \$1000 can lead a client to never hiring you back and giving your name a negative reputation. It's better to let go \$1000 than to burn a bridge that can lead to thousands more and years of employment. I was on a contract for 6 months and during that time there was a crack down on contractor expenses being reimbursed by the client. A VP took over for a low administrator and decided that some flights were too expensive to reimburse even though the tickets fell below the amount outlined in their current policy. When he reviewed my ticket it was also deemed too expensive and I was out \$1600 (the contract was in Hawaii). It seems like a large amount of money, but when compared to

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the overall deal given to contractors by the client it was a relatively small amount. It equated to two days of work at the rates they were paying not including the rent, rental, and food were taken care of as well. This was my last expense report and I had already rolled off the project, so I sent the VP an email letting him know that I respected his decision, thanked him for the opportunity, and hoped to work with him again in the future. Within two months I received a call requesting I renew my contract.

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Marketability

As a consultant, your number one task at all times is to remain marketable.

Analyzing the Market

The world economy, consulting market, and international outsourcing trends are constantly changing. Currently the economy is weak, the consulting market is slow, and outsourcing is gaining strength more than ever. An Indian company recently gave IBM a flat rate of \$54 for all of their consultants. The idea was that with the onshore-offshore model they would take a small loss on contractor's onsite in the US

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while making a significant profit on those contractors and employees in India. This trend of offshoring projects to India, as well as China, is causing rates to drop here in the US.

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Looking For Future Trends

Always try to look ahead at what tools, applications, and industries seem to be gaining traction and paying the best rates. The best way to do this is by networking and asking as many people as many questions as possible. Reading IT blogs and articles can give you a good idea of what skills and software applications are more likely to be offshored.

Stay Current

To stay marketable consultants need to determine and learn new skill sets as they gain traction. The two most significant individual skill sets in recent years have been Java and XML. Java gained momentum in the mid to late 90's and at one time was a must have for many developers wanting to stay employed. Since early 2000, XML has been the buzz word. It has proven to be a useful and pervasive technology finding its way into the majority of applications IT professionals use on a daily basis. This is an example of something every IT consultant must learn to stay current, but it will not, in most cases, get you a job per se. Several positions may require you to work with XML, but it is

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only a format meaning it's just the way data can be presented and therefore does not appear on resumes as "XML Consultant".

Conclusion

Becoming an independent consultant and surviving in today's dynamic IT market takes hard work, continuous education, and frequent networking.

Good consultants will seek out and learn new tools, always watch for future economic and industry specific trends, and keep an eye out for new opportunities.

In my opinion (and in conclusion) all non-managers and executives should be independent consultants in order to keep the workforce sharp, to weed out the weakest links, and to avoid the lackadaisicalness of government mentality workers looking for a pay check with the least amount of effort.