

SUCCESSFUL INDEPENDENT CONSULTING

**RELATIONSHIPS
THAT FOCUS ON
MUTUAL BENEFIT**

AUTHOR OF THE
MODERN MANAGEMENT
MADE EASY SERIES

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ROTHMAN**

Successful Independent Consulting

Relationships That Focus on Mutual Benefit

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This book is for sale at <http://leanpub.com/independentconsulting>

This version was published on 2023-05-09

ISBN 978-1-943487-28-8



Practical ink

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For Mark and the rest of our family, as always.

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Acknowledgments

I thank my consulting cohorts and reviewers for their review and comments: Ahmed Avais, Gil Broza, Rob Bowyer, Vladimir Bushin, Mun-Wai Chung, George Dinwiddie, Aanu Gopald, John Healy, Michael Hunter, Jon Jorgensen, Mark Kilby, Ryan Latta, Joe Lynch, Susan Moore, Brett Palmer, Kemmy Raji, Amitai Schleier, Lisa Sieverts, Daniel Steinberg, JF Unson, ShriKant Vashishta.

I thank Rebecca Airmet and Mark Posey for their editing. I thank Karen Billip for her layout and Jean Jesensky for her indexing. I thank Cathi Stevenson from BookCoverExpress for her cover design.

Any mistakes are mine.

Introduction

I started 1994 as a middle manager in a software organization. In August of that year, I argued—politely—with a senior manager. Three weeks later, that company laid me off. My employer called it a layoff, but I was the only one affected.

I'd flirted with the idea of consulting before, but had not prepared for an abrupt transition to running my own business. It took me three months, but I landed a workshop as my first engagement in 1994. The next year, I replaced my salary. But, finally, in 1996, I made enough money as a consultant that my business was successful enough to more than replace my employee salary and benefits.

I've now spent almost three decades as an independent consultant.

Along the way, I've learned what's worked for many other successful independent consultants and me. Successful independent consultants share many of the same qualities. We practice these actions, what I refer to as the consulting engine:

- Use both consistent and a variety of content marketing to attract our ideal clients.
- Learn via formal and informal training throughout our consulting careers.
- Choose which work to do and when to drop certain work.
- Charge enough for our expertise so our clients see our value and we benefit.

In addition to the consulting engine, we create systems so our businesses can thrive.

If you're considering consulting, this book contains everything I know about how to be a successful independent consultant.

Maybe you've seen consultants who were not successful. In my experience, these consultants miss one or more of the consulting engine actions.

There are even some common sayings about consulting. Maybe you've heard, "Consultants are people who take your watch, tell you what time it is, and then charge you a pile of money." In this case, the client does not perceive any added value from the consultant. Too often, that's because the consultant does not have the expertise or experience to deliver value.

Or, you might have seen the consultant-as-seagull. They swoop around, poop a lot, and then leave. When they leave, the client is often in a worse place. In my experience, seagull consultants have expertise in a box. If the client needs their expertise, that's great. But the consultant doesn't have enough critical thinking skills or additional expertise or experience to deliver value to the client.

Worse, you might see a too-common practice of larger consulting firms. The senior people at the top of a consulting firm sell the services to the client. Then, the people at the "bottom," the new, untested, and inexperienced people, deliver the services. Without experience, these people stumble through engagements.

These consulting options all focus on the consultant's personal benefit, often doing something *to* the client. None of these options create win-win relationships for effective and mutual benefit.

Instead, successful independent consultants use their expertise, and all their value to build relationships and deliver results *with* their clients.

Consultants support a client's changes. Clients learn and grow. In exchange, clients pay consultants. However, successful independent consultants also learn from the engagement and gain more experience.

That relationship and learning—not only money—is how independent consultants succeed. It's also how they build relationships that

can help the consultant serve that client again and again.

You don't have to resort to taking watches, acting like a seagull, or separating how you sell your services from delivering those services.

Instead, you can create a satisfying and successful professional life that serves you and your clients.

There are two parts to becoming a successful independent consultant: working *in* the business, to create your consulting engine, and working *on* the business, to maintain your sanity and excitement.

Let's start with the consulting engine.

Part 1: Build Your Consulting Engine

Many successful independent consultants describe an iterative loop for their business. These consultants:

- Based on the consultant's expertise, decide which problems they will help their clients solve.
- Attract clients with ongoing content marketing.
- Create relationships with not just the person who can buy their services, but with more people across the organization.
- Learn from the engagement. Should the consultant offer this kind of engagement again or modify it? Might the consultant look for more clients like this one or expand their potential client base? These reflections help the consultant recognize their increased value and which problems to solve next.

That's the consulting "engine."

Successful consultants iterate their way through the engine loop. Along the way, the consultant and client build and maintain a relationship based on trust and respect. Clients rarely receive the outcomes they want and need without that trust and respect.

This part of the book is how you can build your consulting engine, starting with how you might assess your current value to potential clients.

1. Define Your Unique Value

Consultants start with specific expertise. The more you consult and build your content marketing, the more you'll iterate your practice, evolving it. Consider thinking about your successful consulting practice as a jewel, with multiple facets sparkling in any light. Your expertise creates those facets, as you choose how to offer your value to clients.

As an employee, your manager or organization might have limited where you could offer value. You had a role and fulfilled it.

As a consultant, you have the opportunity to see and experience more situations than most employees have. Assuming you learn from that experience, you can now provide more value to more kinds of organizations and people. The more you consult, the more valuable you become to your clients.

How can you tell where you add value? Consider anything you taught others. Or what people tell you is your "superpower."

You might add value because you have a different perspective or slant on your consulting topics.

That value exists because consultants help clients see what or how to change.

1.1 How Consultants Add Value to Clients

Consultants help a client transform or change in some way, to improve the client’s condition. That means consultants can work in any number of roles to help the client improve.

The article, *Choosing a Consulting Role: Principles and Dynamics of Matching Role to Situation* [CKM90](#), describes possible roles and stances we might take as consultants.

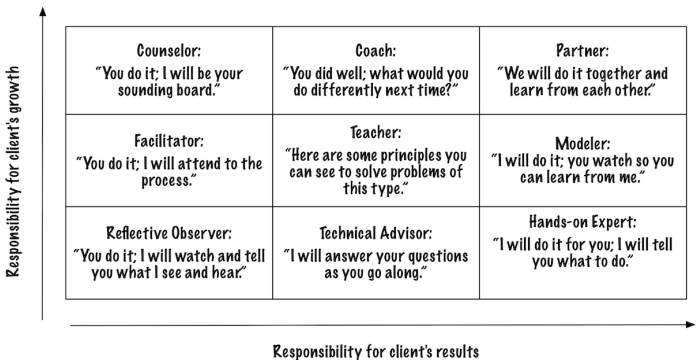


Figure 1.1: Possible Consulting Roles

The more consultants facilitate the client’s work, the more valuable the consultant is to the client. The upper rows and leftmost columns are more facilitative roles. Consultants can charge more for that kind of work.

Here are some examples of how consultants differ from employees.

As an employee, Andrea, a senior software developer, already works as a Technical Advisor, Modeler, and Hands-on Expert. She knows she can perform those roles as a consultant. However, she wants to add Teacher, Coach, and Partner to her skills to succeed as a consultant. For that, she will need to improve her communication and relationship skills.

Simon, originally an employee project manager, stopped managing projects as a Hands-On Expert several years ago. Now, as a consultant, he uses his project management background to set agendas and teach others how to facilitate all kinds of meetings and workshops. He has added Teacher, Coach, and Counselor to his skills.

The more responsibility you have for the client's growth, the more value you offer as a consultant.

That's why successful consultants review their skills periodically to see where they offer value to their clients.

Aside from your perspective or slant on your expertise, clients buy your services so you can support their desired changes. (Some clients don't want to change, but you might only learn that once you're in the engagement. See [Strengthen the Client Relationship](#) for details about this and other client problems during an engagement.)

1.2 Understand Your Skills

If you're new to consulting, consider these questions to frame your thinking:

- You excelled at some of your past work, and you know other companies (or people) will pay for that work.
- People asked you for advice based on your work.
- Somebody said, "You should be a consultant because you offered me so much value when you did this thing for us."

Your client value is your perspective plus your interpersonal skills.

Think back to what other people asked you to do—or that you volunteered to do—because you're good at those activities. If most

of your skills, similar to Andrea's in the previous section, lie primarily in the how-to-do-the-work, use the ideas in [Appendix A](#) to inventory them.

But don't stop with technical skills. While technical skills can be quite useful, they are not sufficient for long-term success. That's because the more a consultant has responsibility for the client's growth and results, the more the consultant will facilitate other people's work.

That facilitation often starts with communication skills.

1.2.1 Communication Skills

Brian, an experienced software architect, told me that he worked with highly technical teams, day in and day out. He also said: "The more I practice my interpersonal skills, the feedback, coaching, and influence, the more successful I am as a consultant."

That's because, as Gerald M. Weinberg said in *The Secrets of Consulting: A Guide to Giving and Getting Advice Successfully* [WCO14](#):

"No matter how it looks at first, it's always a people problem."

Your technical skills might help you sell an engagement. However, your interpersonal skills will help you propose and deliver a successful engagement. Interpersonal skills help consultants describe and communicate how the client's environment aids or prevents them from seeing their challenges or changing.

Here are some communication skills most consultants need to be successful:

- Asking open-ended questions and using active listening to hear the answers.

- Writing, speaking, and visualizing what you see so clients can understand their current challenges.
- Writing, speaking, and visualizing your work as content marketing to attract more clients.

All these skills require empathy with your clients and where they are in their change journey. That leads to effective relationship-building with your clients.

1.2.2 Relationship-Building or Influencing Skills

Only one of the consulting roles, the Hands-on Expert, in [Figure 1.1](#) allows the consultant to deliver outcomes alone. All the other roles require interactions with the client.

Successful independent consultants build relationships with many people at a given client—especially the person who signed the Purchase Order. (See [Recognize Your Buyer](#) to understand the various roles the client personnel might take.)

Here are some necessary relationship-building skills:

- Build rapport with potential and current clients, especially with the economic buyer. That rapport allows consultants to retain the client for more engagements.
- Build trust with potential and current clients.
- Maintain sufficient self-esteem, so the consultant doesn't need to take credit for their client's successes.
- Focus on outcomes. Sometimes, consultants are attached to a specific process or tool, especially if the consultant offers a certification or is part of a certification system. When consultants focus on outcomes, they can offer their clients several options to achieve their desired changes.

The more you build these relationship-oriented skills, the more success you will have in influencing clients to consider and use the changes you recommend. (Influence includes exploring what the client might want as results and how they might achieve those results.)

You don't need all of these skills *right now*. You can practice and learn them as you proceed. However, successful consultants have enough of these skills to offer sufficient value to their clients.

Many successful consultants also share these personal qualities.

1.2.3 Personal Qualities

Our qualities help us build client relationships. Here are qualities I have found helpful:

- Initiative. You take the initiative to get clients, get referrals, and do the necessary work to succeed in an engagement.
- Curiosity. The more curiosity you have, the more likely you are to learn more and keep an open mind about your clients and their challenges.
- Adaptability. You can consider several options for many situations.
- Resilience. You can recover from setbacks.
- Perseverance. You don't quit. You have sufficient grit.
- Collaborative. You're willing to work with your client.
- Negotiation. Find ways to create win-win situations. You will need these skills to create engagements and deliver the desired outcomes.
- Influence. You can exhibit your competence and build rapport to assist others in considering and implementing their possible choices.

While each consultant has more or less of each of these qualities, most successful consultants also find ways to build rapport with potential clients quickly.

Some people call these “soft” skills. I prefer to call them interpersonal skills. Ask yourself which of these skills you want to practice to influence others and create a resilient business.

As you use your communication skills to strengthen relationships with the client, you might need to learn how to explain the client’s challenges. Those are critical thinking skills.

1.2.4 Critical Thinking Skills

While clients often see the problem signals, clients don’t always see the root cause(s) of their problems. Worse, clients don’t always recognize the range of reasonable solutions for those problems.

Successful consultants will support the client as the client learns to see their challenges. Many consultants use a variety of critical thinking tools to help explain the situation and create options for change.

Here are some possible critical thinking skills tools:

- Force Field Analysis
- Causal loop diagrams with reinforcing and balancing feedback loops.
- Several kinds of data collection and organization, both qualitative and quantitative. For example, I’ve calculated cycle time, Cost of Delay, and the effects of delayed customer response times for different clients.

Avoid accepting the very first root cause you see. Remember to look for indications of much deeper problems.

For example, value stream mapping helps me explain the effects of people working separately. However, the map alone does not help the client reason about the situation.

Consider when you will review the various models and lenses you use. Sometimes, the client needs a different lens on the situation. See [Consider These Consulting Tools](#) for more ideas.

The more you consider different ways to explain the client's challenges and possible options for solutions, the more you will hone your critical thinking tools.

Even if the client only pays lip service to change, your client deserves your best reasoning about what you see and their options.

1.3 Inventory Your Skills

Take time to assess your consulting-specific skills. This worksheet also has the more traditional skills from Appendix A:

Consider which skills you want to from Appendix A: Functional skills Problem domain expertise Tools and technology Industry expertise	
Communication Skills	
Personal Qualities	
Relationship-building	
Critical thinking	
Any other skills you think will offer your clients specific value	

Figure 1. 2: Skills Inventory Worksheet

You don’t need skills in all areas—you can only maintain skills in some areas. However, consider which functional and consulting skills offer the most value to your clients. Then, you decide which other skills you might choose to acquire.

Everyone is unique. And, as long as you [Keep Learning](#), you’ll continue to add to your skills.

Now, it’s time to see how you’ve used those skills in the past. What you’ve learned so far offers value to your potential clients.

1.4 Articulate Your Value

How will *you* support your clients to see their possibilities and guide them through their changes? Remember the roles from [Figure 1.1](#).

Do you need to compete with all the other consultants in your field?

No, for two reasons.

First, you offer specific, unique value. How will *you* help your clients improve and change? What's different about what you can offer your clients? That's the combination of your perspective and your experience.

Second, successful independent consultants can experiment and evolve their practices on purpose. You don't have to "scale" your business to succeed, so you don't have to compete with other consultants.

If you wonder about your unique value, think back to how you've succeeded through the years.

One way to do this is to review your previous work and assess the tangible and intangible benefits of that work to your previous employers or clients. You might discover that you offer more value than you think you do.

Here's how to start:

1. For each recent role, either as a consultant or an employee, list your actions with verbs. Did you facilitate, teach, lead, or perform some other action? Write down everything for that role.
2. Determine your tangible value. Your actions helped the company save money or time, increase revenue, or something else of value to the client. Estimate the monetary value of your work.
3. Assess your intangible value. Your actions might have: helped a team work better together, created better relationships, or facilitated other people's actions.

Remember to add what your boss or client said about your value.

The combination of your actions, plus your tangible and intangible value, will help you see how to define your value.

1.5 Assess Previous Work

Whether you worked as an employee or consultant, assess your previous work to see how you increased which skills. Consider the table in Figure 1.3, Consulting Performance Against Value to assess your work quarterly or yearly.

Consulting Performance Against Value			
	Engagement	Value to Client	Value to You
Successful engagements	List each successful engagement	List all the possible value the client received	
Engagements still in progress	List in progress engagements	Value so far	
Unsuccessful engagements	List each unsuccessful engagement	Even some unsuccessful engagements might offer value	

Figure 1.3: Consulting Performance Against Value

If you’re assessing your employee work, consider how that work can map to consulting engagements. Ask these questions as you evaluate the results:

- Start with column 1, the engagement. What is your assessment of the success of that engagement? (Put each engagement into one of the Successful, In Progress, or Unsuccessful rows.)
- In column 2, assess the client value. What kind of value did the client receive? Even engagements In Progress might offer some value so far.

- In Column 3, assess the value you received.

Consider a separate page for each year of work, starting with the most recent year. Now you can decide if you want more or less of that kind of work. Then determine if you will change your skills to increase your client's success or value.

That's when you might choose which skills to reinforce—or release.

1.6 Choose Which Skills To Reinforce

Which skills do you want to reinforce or acquire? I've offered several ways to think about skills.

Ask this question:

Do you have sufficient skills to do the consulting you want to do?

Long ago, I met John, who'd graduated from university three years earlier. His title at the time was "Senior Software Engineer."

He told me he wanted to consult as a software architect. I asked him this question:

"What three systems have you architected, either as a lead or as part of the architecture effort?"

He frowned. "None," he said. "How hard can it be? The architects are wrong, anyway. They get paid a lot."

I asked him if he wanted feedback. John did. I suggested he might not have considered all relevant aspects of consulting:

1. Clients only pay you if you can help them change or solve their problems. If you don't have the experience to do the job, the clients will learn that and fire you.

2. What previous successes would allow him to obtain an engagement?
3. Did he plan to acquire all his expertise while consulting for his clients? If he was honest with clients, that might be okay. Did he want that career path?

We discussed the value of living with our design, code, and tests for several years to see how our early decisions affected later possibilities.

He hadn't thought of any of that. He thought consulting was straightforward and offered easy money. John didn't consider his potential value to the client or ongoing work from the client.

The deeper your skills—in your chosen dimensions—the more effective you can be as a consultant. Deep experience can help you find better clients. Because you offer more value, you can ask for and receive higher fees.

Use your skills inventory to see when it makes sense to start or evolve your consulting business. See where you want more experience and decide how to get that experience.

As you assess your skills, remember to maintain your self-esteem.

1.7 Maintain Your Self-Esteem

Some consultants think they are above average and can solve “all” their clients' problems—an example of the Dunning-Kruger effect. The Dunning-Kruger effect causes us to overestimate our abilities—that we are always above average. These people don't learn from feedback, which not only detracts—but short circuits—their learning from their experience.

On the other hand, some consultants suffer from Imposter Syndrome, where they worry if they have any capabilities at all and

think they are a fraud. They might take “safe” engagements and avoid potential risks, experiments, and alternatives. They repeat the same year(s) of experience again and again.

Neither is a healthy state. And either state prevents consultants from learning.

Both Imposter Syndrome and Dunning-Kruger thinking can damage your self-esteem. Consultants need their self-esteem for everything they do.

Instead, consider the idea of the growth mindset from Carol Dweck’s book *Mindset: The New Psychology of Success* [DWE07](#). Dweck’s book describes the fixed mindset and the growth mindset. When you have a fixed mindset, you think people have—or do not have—specific capabilities or skills. You might even call those skills talents.

When we use the growth mindset, we reframe our thinking into learning. Instead of assuming we have “natural” skills or talents, we choose to learn and practice almost anything.

One of the ways I build my self-esteem is to practice something every day. (See James Clear’s *Atomic Habits* [CLE18](#).)

In addition, consider reading Weinberg’s *More Secrets of Consulting: The Consultant’s Toolkit* [WCM14](#). That book is about the self-esteem toolkit most consultants need throughout their careers.

1.8 Clarify the Value You Bring to Clients

Throughout this chapter, I’ve suggested ways you can think about the skills you bring to your potential clients. Now it’s time to discuss what makes you a unique consultant.

You.

All of you, including your experience and perspectives, together in one package.

Until now, your managers might have offered you feedback to make you more like others. But sameness doesn't work for consultants. Successful independent consultants optimize for their uniqueness.

As a consultant, your first sale is to yourself. If you believe in your value, you can craft your marketing, proposals, and services to showcase your value to your clients.

1.9 Now Try This to Recognize Your Unique Value

Each chapter in this book has a "Now Try This section." You will gain the most from this book if you take the time to answer every chapter's questions. I recommend you use a notebook, whether it's electronic or physical.

In your consulting notebook, write down your answers to these questions:

1. Review your perspectives about the problems you want to solve with your clients. What about your perspective is different? If your perspective is the same as others, how will you make it different in some way?
2. What did you learn about yourself from your skills inventory? What surprised you about your current skills?
3. Which skills do you prefer to perform? Which skills do you want to adopt or learn as a challenge to yourself? Make an action plan now for the skills you want to learn.
4. Where has your work offered you and your client/employer the most value?

You know your expertise and value. Now it's time to move to how your skills match the problems you see and that your potential clients have.

2. More from Johanna

People know me as the “Pragmatic Manager.” I help leaders and teams see simple and reasonable alternatives that might work in their context—often with a bit of humor. Equipped with that knowledge, they can decide how to adapt how they work.

If you liked this book, you might also like the other [books](#) I’ve written:

Management Books:

- *Practical Ways to Manage Yourself: Modern Management Made Easy, Book 1*
- *Practical Ways to Lead and Serve—Manage—Others: Modern Management Made Easy, Book 2*
- *Practical Ways to Lead an Innovative Organization: Modern Management Made Easy, Book 3*
- *Behind Closed Doors: Secrets of Great Management*
- *Hiring Geeks That Fit*

Product Development:

- *From Chaos to Successful Distributed Agile Teams: Collaborate to Deliver*
- *Create Your Successful Agile Project: Collaborate, Measure, Estimate, Deliver*
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- *Predicting the Unpredictable: Pragmatic Approaches to Estimating Project Cost or Schedule*
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Personal Product Development:

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Johanna