



The Professional Consultant Practical Tools and Tips

IEEE Consultants' Network of
Silicon Valley

www.californiaconsultants.org

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Objective:
**Have stakeholders perceive you as
being a professional**

Who are the stake holders?

Communications



What we got here is... failure to communicate
Most engagements that are less than successful are
caused by failures in communication

Communications

Identify the most appropriate communications style

Match the Client and his/her desired tempo of engagement.

Be available, always in a business context

Return calls/emails within 24 hours if possible

Communications

Remember verbal + non-verbal = complete message

Try to frame in what you CAN do

Avoid blaming others

Establish a sense of when the end is near

<http://ieeeusa.org/careers/webinars/archived-webinar.asp?ID=100>

Three Phases

The Front End: Projecting a
Professional Image

The Middle: Acting Professional On
The Job

The Back End: Running Your Business
Professionally

The Front End: Projecting a Professional Image

Marketing collateral

Web Site

Email

Business Cards

Letterhead

Flyers

Bio

Photo

Ongoing activities

Social Networks

Presentations

Publications

Associations

Continuous Education

Certifications

Appear
Image
Act
= Fake ?

“We are what we pretend to be, so we must be careful what we pretend to be.”

Kurt Vonnegut

Web Site

A Domain Name is a MUST HAVE.

www.hosting-review.com
webhostinggeeks.com

Why do you ask your clients to use your services instead of doing it themselves, yet think you can do your own web site?

Use www.CaliforniaConsultants.org as a source

Email

A Domain Name is a **MUST HAVE**.

Don't mix personal and business

Use a signature file

Business Cards

Please! Don't print them yourself!

www.vistaprint.com

www.123print.com

Always have them on you

Don't worry about a logo

Social Networks

Keep personal and business networks separated

Your personal friends and your business associates are two different groups

Spend time developing your LinkedIn profile

Consider your contacts/connections strategy

Presentations/Publications

Participate as a presenter at events

Moderate conferences

Blogs

Podcasts

Webinars

White papers

Books

Associations

Get involved in trade, professional, and technical associations and societies

Volunteer to chair a committee, be an officer, and work up to be invited to be on the Board of Directors.

Join Consultants groups such as the IEEE Consultants' Network of Silicon Valley!

Continuous Education

Attend continuing education classes and lectures or webinars

Go to conferences; pay for the classes and tutorials not just the exhibits

Follow the online publications and the blogs, white papers and books

Write or teach to learn

Certifications

Technology specific

Microsoft Certified Architect MCA

Cisco CCDP

many others.

Project Management Institute (PMI)

Licensed Professional Engineer P.E.

IEEE Certified Software Development Professional

State governments in a number of states are exploring licensing requirements for software developers

The Middle: Acting Professional On The Job

Ethics – when to say “no”

NDA – consultants are a “perfect storm”

Contract – never work without one

Work Products – stand in for you

Even the ***appearance*** of a conflict of interest or impropriety must be avoided

Know about the codes of ethics of relevant professional associations (like IEEE)

<http://www.ieee.org/about/corporate/governance/p7-8.html>

Be willing and able to say “No” when asked to do something illegal, unethical, or just bad business

Respect the NDAs that have been signed

A consultant is the “Perfect Storm” for the NDA

Be explicit when using equipment on loan

The Contract

- Never work without a signed contract
- Include inclusion/exclusion of liability, warranty, and intellectual property ownership
- Include a clear definition of deliverables and a reasonable schedule
- Include cancellation and change order terms that protect the Consultant, but are reasonable
- Everyone needs to agree on the scope

Work Products

Your work products describe you when you are not present

Say what you will do and then do it

Deliver on time and within budget

Deliver a bit more

Professionally organized, documented, and packaged

Comply with industry/company standards

The Back End: Running Your Business Professionally

Advisors

Business Entity

Licenses

Accounting

Invoicing

Renting an Office

Fax

Advisors

Legal (lawyers / para legals)

Financial / tax (CPA)

Insurance

Bookkeeping?

Form a Business Entity

Please ask an attorney for legal advice and a CPA for tax advice

Being incorporated engenders more respect

Many Clients will only engage a consultant on a “Corp. to Corp.” basis due to IRS concerns

A business entity should be using a properly registered “Fictitious name”

Licenses

A Consultant should check with relevant state, county, and municipal governments to see if he/she needs any type of license

Business licenses are one example

In California check www.CalGold.ca.gov

Accounting

Talk with a CPA / bookkeeper

Keep separate records

Open separate accounts

Show movements of funds between business and personal accounts as distinct transactions

Quicken Home and Business

QuickBooks

Invoicing

Can't expect to get paid without an invoice

Have terms such as net 30 built into your contracts and your invoices

Print invoices from MS Word, Excel, or accounting software. Make these look professional

Quicken Home and Business

QuickBooks

Renting an Office

You may never actually require anything beyond a home office

Executive suites and co-working spaces

www.pbcoffices.com/lp/sanjose.html

www.regus.com

www.semanticseed.com/coworking.html

www.nextspace.us

Some rent conference rooms to non-tenants

The Professional Consultant

<http://www.strongenging.com/papers/TheProfessionalConsultant.pdf>

IEEE Computer Society

Finding Success in Consulting: Niche and reputation are both key

<http://www.computer.org/portal/web/buildyourcareer/JT-25>

Alliance of IEEE Consultants' Networks

<http://www.ieeeusa.org/business/documents/AICN-Newsletter-Winter-2011-d3.pdf>

Q & A