Careers in Consulting

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The definition of a consultant means different things to different people, but it is especially important to answer this question for yourself. The most obvious answer is "to consult," or seek someone's opinion, advice, or guidance; or, seen from the other side, to consult is to offer someone your opinion, advice, or guidance. Think of the many ways you have already been a consultant either giving or receiving advice, guidance, and opinions. You are likely to have already been a consultant in some way today. Being an instructional design consultant is not much different than the other kinds of formal and informal consulting you have probably already done. Simply, a professional consultant offers considered opinions related to tailored solutions for specific clients and their needs.

In this chapter, we'll introduce you to the world of consulting and discuss how to prepare for and find a job as a consultant, write proposals and contracts, and succeed as a consultant. We will also provide tips along the way that we discovered as consultants and hope you find this information beneficial.

Preparing for a Job as a Consultant

As you prepare for a job as a consultant, it is important to establish how a consultant is different from other employment types. In this section, you will read about what sectors consultants work in, why firms use consultants, what skills you will need, where you will physically work, and whether or not consulting is a good fit based on your individual circumstances.

What's the Difference Between a Consultant and Contractor?

As a consultant, you are more likely to work directly with your client rather than through an intermediary organization. If you work for yourself or with other consultants, you will need to [choose a business structure](#), such as a sole proprietorship or limited liability corporation (LLC). You are more likely to work under an IRS Form 1099, which means that you will be paid a gross amount and you'll need to pay for your own taxes and medical insurance.

A contractor is often perceived as someone who is working for a limited amount of time in a narrow role with specific tasks on a larger project within a formal organization. A contractor might work directly for an agency as a W-2 employee (the taxes will be paid by the agency) but work on-site at the client's organization.

There are different tax and legal implications and business license requirements for owning a business, so be sure to consult professionals such as tax lawyers and CPAs.

Where Do Consultants Work?

Instructional design is a field of expertise that is used across all economic sectors to work on projects from industry to non-profit organizations to the military to PK-12 education to corporations to higher education and government. The best source of information for employment across economic sectors, as well as information about specific

occupations, is the United States Department of Labor. Be sure to review the Department's [Occupational Outlook Handbook](#) and [O*Net Online](#).

You may need additional or specialized skills, depending on the specific sector. For example, if you consult for PK-12, you willll most likely need teaching experience. If you want to consult for the military and often in government positions, you will need to have a security clearance. It may be easier to work directly with an agency who is already set-up to work in these areas.

Why Do Firms Use Consultants?

Firms use consultants for a variety of reasons. Perhaps the firm is looking for someone with specialized skills to work on a short-term (or longer-term) project, or perhaps the firm is looking for someone with an outside or new perspective. While consultants can provide objectivity in their evaluation and advice, note that consultants sometimes have pre-existing relationships with members of an organization's leadership who may want the consultant to offer an "objective" stamp of approval for a specific direction already identified. There are other challenges to objectivity, such as wanting to please leadership for the benefit of future contracts or some other perk. Of course, some firms hire consultants to be a genuine change catalyst; for example, a consultant could identify current or potential problems as well as potential solutions. A firm might hire consultants to leverage their networks, supplement the capacity of internal personnel, or just do the dirty work of budget and/or personnel cuts (think about the role of George Clooney in the movie, [Up in the Air](#)). Asking a firm why they are hiring a consultant may offer additional information to help you tailor your approach.

What Skills Do I Need?

The list of skills may seem short, but it takes a good deal of self-reflection to determine if you have the skills required to become a successful consultant. Whether or not you will make a career out of consulting or continue to work full-time and consult on the side, the skills are the same.

The following list will help guide you through some of the questions you should ask yourself:

- Initiative and self-motivation/discipline – Are you a self-starter? Are you motivated to work even when no one is managing you?
- Self-awareness – Do you know what you are good at? Are you a generalist or a specialist?
- Adaptability – How do you feel when schedules change, someone makes an unexpected demand on you, or opportunities and constraints shift? Can you adapt to working on time-limited projects at different benchmarks with different clients across multiple sectors requiring different aspects of your expertise?
- Structure – What is your method or practice for working? Are you more laid back or hyper-organized?
- Communication – How will you deal with difficult situations with a client?
- Project management – Are you able to juggle multiple tasks and deadlines?
- Basic business acumen – Can you budget effectively?
- Technological skills – Are you able to fix your own IT issues? Are you familiar with hardware and software?
- Networking – Do you have a list of professional contacts? Are you comfortable talking to strangers about your business?

The Most Important Skill

The most important skill as a consultant in the field of LIDT is communication.

What Kind of Work Environment Will I Have?

As a consultant, you will need a place to work. This space will vary depending on your particular needs. There are benefits and challenges to every work environment, whether you work at home or an off-site space or have a workspace at the client's office.

Working at home. There are many benefits to working at home. You will not be sitting in traffic every day and you will have a lot more flexibility if you need to tend to your family's needs. You also will not be spending money on lunches, gas, snacks from the vending machine, or dry-cleaning.

However, you will need to treat it like a job outside of the home. It's important to have a dedicated space at home where you can work. Ideally this is in a separate room that isn't your bedroom or family room. This dedicated space should have the appropriate office equipment for your job. You may find it beneficial to get ready for work each day and schedule a lunch break.

There are some challenges to working at home: isolation and distractions. In a traditional work environment, people are all around you all day long. You may only interact with some people in passing at the water cooler, but it's enough to feel connected to others. "Working" at home may mean that you have more flexibility, but this can distract you from doing your actual work. Try to limit these and other distractions (TV, pets, and kids).

> ## I Work in a Closet
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> I (Barbara) have worked in a literal closet —the walk-in closet of the master bedroom, to be exact. The room that was going to be my office was needed as an actual bedroom. I had been considering a standing desk, and my husband and I joked that I could just stand in the closet and put my computer on the wire shelf. Voila! My new home office was born.

Renting office space. If working at home is challenging because of the distractions, there is also the option of renting a dedicated office space. One benefit is that you have a place to go to, so it feels like you are going to work. These dedicated office spaces offer a variety of services, such as having a physical mailing address or P.O. Box, standard office equipment (photocopier, printer, and fax machine), Internet, a receptionist, kitchenette, and a conference room to meet with clients. Prices will vary depending on size of the space and services included.

There are also shared co-working spaces in several markets around the country. You have the flexibility of renting a desk only when you need it, as opposed to renting an entire office on a more permanent basis. It may also be helpful to have other freelancers/contractors around you. However, you have to consider the distractions again. Will you be able to focus on your own work and not be distracted by the projects going on around you?

If an office space is outside of your budget, find another place you can go to like a library, a community center, an apartment clubhouse, or your local (quiet) coffee shop.

Working on-site. As a consultant, you may also be working at the client's location. Your workspace may be anything from a cubicle or desk to a shared conference room. The client knows you're there for a short-term project, so you may not have a permanent workspace. If there is a specific dress code or core business hours or work at home policy, you will need to abide by the house rules.

You will have more direct access to the client, so you may feel like you are more of a member of a team. However, in this case, it is important to remember that you are not an employee of that company, so you may not be able to enjoy the same benefits as an employee, such as use of the gym or discounts. At some companies, you may need to have an

employee escort you into the building each day. You may not have access to the same systems or be able to contact people directly (e.g. the off-site LMS administrator).

Using technology. Regardless of the physical space in which you choose to work, you will also need to consider what technology you'll need such as a lightweight laptop, a reliable phone, and an Internet connection. Depending on the quality of service at home and your cell phone plan, you may need a home phone with a dedicated line.

You may be required to purchase your own software to work on projects. Instructional designers use a variety of software for development and more general business software for word processing, spreadsheet creation, and presentations. Tracking your invoices and business expenses will require financial software. You will also need to consider how you will be connecting with clients if you need to host video and audio conferencing. There are many options available, so look at what best serves your needs.

Working From Home… or Not

When I (Yvonne) was consulting on the east coast, I was working with a team in Europe and a team in California. Working at home gave me the flexibility to get up early to work a few hours with Europe, take a couple of hours to run errands or head to the gym, and then be back before my meetings started with California. I really enjoy working at home. My husband, on the other hand, found working at home to be difficult. He prefers to be in the office. Oddly enough, he actually enjoyed his hour-long commute because it gave him time to listen to his podcasts.

Is Consulting Right for Me?

As mentioned before, consulting requires a particular skillset. It also requires that you have the time, financial ability, and support system to be a successful consultant.

Time. How do you know if you have the time to be a consultant? Only you can make that decision. Do you really know how much time you spend performing tasks in the many areas of your busy life? Do you really know how much time you have for a consulting career or even side job?

There are several time trackers available such as [Toggl](#), [MyHours](#), [TimeCamp](#), [Klok](#), [ManicTime](#), [RescueTime](#), and good ole fashioned [paper templates](#). Be sure to set a specific time and deadline for exploring and deciding, though, or you might end up wasting time learning about how you spend your time.

Risk tolerance. As a consultant, you will not be receiving a steady salaried paycheck so there is financial risk involved. Consulting income has a lot of ebbs and flows depending on how many hours you are billing. It's important to know that you probably will not be billing 100% of your work hours. Every hour that you're "working" you may not be able to bill to a client. In fact, you may only be able to bill 50% of your hours to a client. The other part of the time you'll be networking or finding new opportunities. This may seem like it will not take a lot of time, but it is critical to your success as a consultant to spend a lot of time doing these two tasks.

There may be less busy times of the year. Toward the beginning of the year, businesses may be trying to determine their budgets for the year and you will not have any billable hours. Toward the end of the year, businesses may have run out of consulting budgets and again, you will not have any billable hours.

Think about how many weeks of vacation you want to take during the year. As a consultant, you will not be paid for your vacation time so you may want to have money set aside for the leaner times. You may even want to get your feet wet initially by keeping your full-time job and start your consulting business on the side. Only you can determine your own personal level of risk.

Supporters and distractors. You will encounter people and circumstances who will support your efforts and those who will distract you. You will need to consider your individual situation and ask yourself if your partner or spouse, family, and friends will support your work as a consultant that may require you to work long hours or travel frequently. Will those individuals support you when your income may be scarce? Will you have to say no to that long-awaited vacation because you have a project deadline?

> ### Is Consulting Right for Me?
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> Consulting was really like a roller coaster in terms of hours for me. One year I (Yvonne) didn't have a paycheck in January and February because I was waiting for the client to approve the budget for that year. After the budget was approved, the work quickly ramped up to 60-80 hour work weeks. I remember scheduling a vacation months in advance and, due to project delays on the client's end, I still tried to work while travelling cross-country during an auto-racing event (with very limited Internet at the tracks). The work finally calmed down to a steady 40 hours a week for several months before tapering off again at the end of the year.

Finding a Job in Consulting

Finding a job as a consultant has a lot to do with your goals. Based on those goals, you need to set the pace of the transition from your present state into your future state as a consultant. You may need to start slowly, tackling a few tasks each week and "poking around" for opportunities.

Where Do I Find Opportunities?

There are different ways to find consulting opportunities and the process closely mimics a traditional job search. Searching online job sites, having a social media presence, and networking are the main ways to find an opportunity. You may also have more advantages than you even know. Be sure to check out the [U.S. Small Business Administration](#)'s [set-asides](#) for small businesses, such as those owned by [women](#), [veterans with service-connected disabilities](#), and those who are socially and/or economically [disadvantaged](#). Some state governments offer similar set-asides, so be sure to check with offices in your particular state. You may find it easier to secure subcontracting opportunities with larger organizations that can tackle large government contracts that are likely beyond the capacity of most small businesses, especially if you do qualify for special status with the Small Business Administration or other federal or state programs.

Sites that collate jobs. Essentially, you are looking for a job in the traditional sense. Check out various websites like [SimplyHired](#), [Indeed](#), [Monster](#), or [USAJOBS](#).

> ### You Are Who Google Says You Are
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> Have you ever "Googled" yourself, especially from someone else's computer? You might be surprised at who turns up. Is it you? By simply adding my middle initial to my name wherever possible, I distinguished myself from a popular Hollywood producer. Now, when someone uses my middle initial in a Google search, the top ten or so results are all me and my work.

Social media presence. Social media can be beneficial to look for opportunities and to announce that you are looking for opportunities. Many companies have LinkedIn, Facebook, and Twitter accounts through which they may post opportunities.

Companies will be looking at your web presence, so be strategic in what you're posting. You may want to have a Twitter account where you post best practices or articles that you find that are related to your business. Creating a LinkedIn account is also a good idea. Using specific keywords and a targeted headline will help guide people (including recruiters) to you. Be sure to add a skills section. Don't just create an account and not be active. Use the tool to your advantage and post on the feed.

As a consultant, it's important to create your own brand to differentiate yourself from the competition. Make sure you create a strong digital portfolio to showcase your work. You can use templates in Google Sites, Weebly, or Wix to build your site and then pay to personalize your website's URL.

Local groups. Speaking at local events in your community is a good way to network. As noted in the skills section, effective communication and marketing yourself is a key skill as a consultant. Joining a public speaking group, such as your local chapter of Toastmasters International, will help build your confidence as a public speaker and you will also be networking with other professionals. You never know when and where you will find a consulting opportunity. Check out your local chamber of commerce for networking events.

Networking at the Chamber

My local chamber of commerce has a weekly coffee connection hosted at a different partner's business. It's an opportunity to meet and greet 60-75 people and provide a 30-second commercial about myself. I always, always come prepared with business cards.

Professional organizations. Joining a professional organization and meeting other professionals is a great way to find opportunities through the online job boards and network at the events. Some suggestions are ATD, ISPI, USDLA, AECT, Quality Matters, or OLC, depending on what meets your needs. Remember that many organizations offer less expensive student rates for membership.

Career services office. Do not be afraid to head to your current or former university. Career services may have mailing lists to join or networking events to attend.

Targeting specific firms. You can always reverse roles and search for consulting companies as if you were a potential client to find less-known firms.

Cold-calling. Cold-calling is a lot like dating. You will need to make a lot of phone calls to get your foot in the door. Be brief and say that you will follow up with an email. If you do not feel comfortable calling, you can also send an email to the company or organization. In either case, have a script ready to sell your services and know that not every meeting will result in work.

Converting job/internship posting to consulting gig. Another option is to apply to a traditional job or internship posting and sell your consulting services. Be sure to include the benefits of using a consultant for this type of position. However, it's helpful to know who the decision-maker is instead of sending your resume and cover letter through an electronic system.

Writing Proposals or Contracts

Now that you have been able to find an opportunity, you are at the proposal and/or contract stage. Depending on the size of the firm, the proposal and contract may be combined. The proposal/contract will be very detailed and will need to be thought out carefully.

Scope and Capacity

You need to know two "big picture" items to convert a call for proposals (CFP), request for proposals (RFP), or request for quote (RFQ) into a contract. You need to know the scope of the work being sought and your capacity for meeting the scope of that work. Read the scope carefully and ask questions of the point of contact listed for additional information. You need to completely understand the scope of the work required in order to accurately gauge your capacity to take on the work.

> ### What I Learned From the Contract I Didn't Get
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> When I learned that I did not win the contract, I felt relieved. As I reflected on my feeling of relief instead of disappointment, I realized that the scope of work was too much of a stretch for both my area of expertise and my capacity to manage the project. What did I learn? I learned that my capacity is not always as large as my enthusiasm.

Respond as Requested

The "call" for a proposal or quote is likely to be quite detailed and prescriptive in the way that you should submit your proposal. Be very careful to follow the precise requirements of the call. Answer every question and respond to every section with the requested information – no more, no less. Do not assume details; clarify any questions you have. Even in clarifying the details, reach out to only the point of contact listed and in only the way(s) listed in the call.

The components of your proposal should match precisely the questions and sections stated in the call. Use the exact same language and titles. Do not add sections or attachments unless those are requested. If the call neither explicitly accepts nor declines such additional information, ask the listed point of contact if the additional information you think will be useful would be accepted by the organization. Remember the adage that less is more; too much information or too many examples could make your proposal look unfocused and unprofessional.

Many calls, especially for larger contracts, will specify the timeline after proposals are submitted. While it may be okay to follow-up with smaller organizations, especially those with whom you already know a point of contact, you do not want to breach an established protocol by pestering employees or becoming a nuisance with overt or veiled attempts at follow-up. If you cannot follow the steps outlined in the call, then an organization might assume that you cannot complete the project within established guidelines either.

How Much Do I Charge?

Determining cost is always tricky. There are pros and cons to using an hourly rate versus a fixed rate. When you're first starting off you may want to use an hourly rate until you get a feel for scoping projects. You can charge a different hourly rate for managing the project versus production work. If you charge an hourly rate, you run the risk of not calculating enough hours to complete the project or not charging enough to cover your overhead (taxes, business expenses, travel, etc.). That being said, it might be better to use fixed-rate billing rather than an hourly rate. Remember that you are selling your value so think of your cost in terms of a set value, not by how many hours it takes to complete a job. With a flat rate, your clients will know exactly what they will be paying. There are benefits to both sides. It's really dependent on how financially comfortable you are.

As a guide, The Learning Guild's Degrees for L&D Professionals: What, Why, and Worth? provides salary information and degree expectations. https://edtechbooks.org/-zpqpThis may provide a starting point for you to determine where you should be salary wise. Another great resource is from Harold Jarche. Although his information is from 2007, the ranges are still very much in-line with what instructional design consultants charge today. You will notice that business tasks

cost more than production work. Overall, the range for consulting may be from $25-$200/hr depending on what type of work you will be doing.

What Are the Standard Contract Components?

A contract between you and your client will ensure that your interests are protected, that the work is clearly defined, and that you have established communication and compensation expectations. These contracts typically have a standard set of components. Consider developing your own template for the components of a contract that you want to use. Even if the firm may has a standard contract, having your own template can help you ensure that your important points are included.

Some of the components are rather obvious, like the names of the parties involved. The contract should include directly or reference as an attachment or appendix the specific scope of work to which both parties agreed. You and a representative of the organization should initial each page of the contract as well as fully sign the last page. Ensure that the scope of work is signed separately if it is not included as an embedded component of the contract.

Another important component of the contract is the list of deliverables and the timeline on which those deliverables are due. Remember that deliverables occur on both sides of the project, not just from you to the firm. For example, what access to resources like key individuals and documents will you need to be successful? Make sure there is written confirmation that such access will be granted and include such permission and access as part of the detailed timeline. Client approvals of different stages of a project, especially a large project, should also be included. How long after you share a design plan or set of storyboards should the client offer feedback and approval? Include the specific dates or time range (for example, "within five business days"). For your planning purposes, be sure that you know all of the tasks that need to occur to reach each benchmark along your timeline, and that the timeline is approved by both parties.

Finally, communication expectations and information for both primary and secondary points of contacts should be listed in the contract. In terms of communication, how often are status reports expected, and to whom should those reports be submitted? Are there different individuals who grant permissions, answer questions, and receive status updates? What are acceptable ways to communicate (in person, email, telephone, postal mail)? The approved or preferred methods of communication should include the names of specific individuals (at least one main, primary point of contact and one secondary, backup point of contact) and their direct contact information, such as individual email addresses, room numbers, or telephone numbers.

Costs, payments, and penalties. You will need to determine the costs, payments, and penalties involved when billing a client. You'll also need to identify when you want to be paid and your cashflow. Let's think about this situation: You state that you will invoice bi-weekly, net 30. What does this mean? It means you'll start working on day 1, submit an invoice around day 15 (bi-weekly is every other week), and then the 30-day clock starts. The client will have 30 days to pay the invoice. What does this mean for you? You will not see a check until 45 days after you have started the work. How will you pay your bills if you don't have income for six weeks? Unfortunately, that first check may be delayed by the mail and the client's accounting department. So, in reality, you may not see a check for nearly two months. You may want to change your payment terms to net 15. You can also include a penalty for late payments. A typical charge is 1.5% compounded monthly for a late payment.

Non-disclosure and non-compete agreement. Both of these provisions protect the client. Non-disclosure prevents the consultant from discussing trade secrets, client lists, and other pertinent information. Non-compete prevents you, as the consultant, from starting up your own business after consulting at a company for a designated time period, which could be from six months to two years (any more than that and you should consider whether or not you want to take the position), and within a certain geographic area (which should be focused and not broad like "East Coast"). It may also include information about not soliciting clients or employees from that company.

An important note is that not all states allow non-compete agreements. They are governed by state laws, so check with your state to determine whether or not you can include one in your contract.

Early termination of contract. Unfortunately, contracts may need to be terminated early. This could be for a variety of reasons, but it really should be reserved for really serious issues such as non-payment. You can include a timeframe for written notification for termination and an early termination fee.

Terms of use. Having access to work samples to place in a portfolio or listing the client on your website should be discussed on a case-by-case basis and either be included in the contract or discussed at project completion.

Succeeding as a Consultant

After you have finished your first project (and subsequent projects), a good tip is to think about the lessons learned of what worked, what did not work, and how you can move forward. Take what you have learned to the next opportunity.

How Do I Adapt to Changing Needs?

As a consultant, you will be juggling both your personal life and your professional life. You may need to move to a different city or state, or your kids may need you to have a more flexible schedule to be more involved with their extracurricular activities. You will also have to balance the consulting side, which requires you to be more adaptable. You may need to hire additional resources to assist you to keep working on multiple projects. Clients may change depending on their needs and budget. As the economy changes over time, your focus on a particular industry may change. Who knew the high-tech industry was going to take a hit in the early 2000s or the mortgage industry was going to have a crisis in 2008? Be prepared as much as you can, and have a safety net for the leaner times.

What Do I Do When Things Go Wrong?

As with anything in life, there may be times when something goes wrong at the company, in your personal life, within the client/consultant relationship, or with something outside of either's control. You have resources available to you. Ask for help from a mentor when you need it. You can find mentors through the SBA (check out [SCORE](#)) or your network.

How Do I Maintain and Grow My Client List?

The best way to maintain and grow your client list is to keep working. Be careful of relying on a single client. While the work may be steady and lucrative for a while, that client's needs or budgets may change. One way to grow your client list is to look at other firms that do work similar to the work of your current clients. However, remember your non-compete or other agreements before investigating if those firms have similar needs.

Another way to grow your client list is to reconsider some of the decisions you made at the beginning of your consulting journey. Do you want to broaden the kinds of consulting work you are willing to do or perhaps the kinds of clients for which you are willing to work? Maybe new opportunities have popped up since the last time you did an environmental scan of your area; there might be new firms or changing needs. Repeat some of the steps in the Finding a Job section to see what might be new.

Meanwhile, the best way to maintain your client list is simple relationship management. Always do a good job with your work. Reach out occasionally to offer casual greetings or an article you know is relevant to your client's work without seeking anything in return. You might even consider sending seasonal cards small fruit baskets, or offer free webinars to the firm's employees or associated organizations. Always remember to maintain the relationship in ways other than just soliciting work.

How Do I Stay Current?

Staying current is an important part of being a successful consultant and it requires some introspection. Think about your reputation as a consultant. Do you perform quality work and deliver the materials on time? Are you still networking with others in the field by speaking at local events and conferences? Do you need to update or refocus your skills? Are

you using the most up-to-date software? Are there gaps in your knowledge? These are all things you should consider in order to stay current.

Conclusion

Now that you have been introduced to consulting, we hope that you are walking away with some information that will help you decide whether or not consulting is a good fit for you. Consulting can definitely be an exciting, yet challenging, job. It can force you out of your comfort zone and provide many great opportunities to hone your craft within LIDT.

> [?] Please complete this short survey to provide feedback on this chapter:
>
> http://bit.ly/LIDTConsultingCareers

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