
Preparing for Success

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WHAT YOU'LL NEED TO START

Internal Resources

Hearing that you need to “get experience” is a common, yet vague and unhelpful recommendation. Actually, there is much more to consider when contemplating a consulting career. There are specific internal resources that contribute to successful consulting. According to the experts, much of what is needed can be learned. However, a few informants felt that some important qualities can best be attributed to personality or innate talent. In other words, everyone may not be suited for a career in consulting. Edwards and Edwards (1996), authors of *Secrets of Self-Employment*, insist that, “. . . you can make it on your own if you have a strong desire and willingness to become a goal-directed, self-motivated person.” If this is the case, then graduate school may be an excellent preparation for self-employment, because to successfully complete a graduate degree, you need to be goal-directed and self-motivated. In speaking with key informants about the prerequisite skills necessary to be an effective consultant, they consistently mentioned “people skills” or “social skills” as most important. For the purpose of gaining some clarity on what this really means, we’ll consider these general terms to be comprised of several specific components, such as personal characteristics, knowledge, and skills/abilities.

Personal Characteristics

What type of person does it take to be a successful consultant with community-based organizations? When describing what is needed to succeed

as a consultant, nine personal characteristics were cited consistently. It is arguable whether these traits are learned or innate. Moreover, these characteristics were described by some informants as essential prerequisites and by others as the natural result of gaining experience.

- Authenticity
- Self-confidence
- Patience
- Flexibility
- Tolerance for ambiguity (and financial insecurity)
- Empathy
- Desire for continual learning
- Orientation toward service
- Interest in proving yourself time and again

Authenticity is a highly valued personal characteristic and helps to build trust with your collaborators/clients, which is one of the most important ingredients of successful consulting. Another commonly shared sentiment among informants was the need for the consultant to exude confidence in his or her ability to get the job done right. Organizations are looking to you as the expert, so they want to be assured that you know what you are doing. Nonprofits are not always well-oiled machines, and if they were, they would have little need for your assistance. Patience, flexibility, tolerance for ambiguity and financial insecurity are also frequently cited as necessary for consulting work. These personal characteristics make the challenges we discussed in Chapter 1, “Before You Begin,” more manageable. In addition, internal self-motivation and fortitude are essential characteristics of a successful consultant who must often wade through projects that have been delayed due to circumstances beyond his or her control.

Furthermore, empathizing with clients and stakeholders is paramount when it comes to evaluating programs, providing useful advice, or finding workable solutions to organizational problems. Those who desire to continue learning and improving their many essential skills are going to become more effective consultants than those who try to apply what they already know well to each new situation they encounter. A service orientation is useful for helping you relate to collaborating organizations and individuals. Lastly, thick skin and persistence are essential. With every new client, you will have to prove your worth. This can seem like a daunting and tiring process at times, but it is also a challenge you must face with fortitude if you want to maintain success in the field.

Knowledge

What do you need to know in order to be a successful consultant with nonprofits?

Knowledge . . . is the foundation on which abilities and skills are built. [It] refers to an organized body of [information], usually of a factual or procedural nature, which, if applied, makes adequate job performance possible. . . . Possession of knowledge does not ensure that it will be used. (pg. 65, Goldstein & Ford, 2002)

The knowledge you'll need prior to starting your practice falls within three categories: (1) "pure" consultancy, such as how to build and maintain relationships with clients; (2) topical or specialized knowledge; and (3) business operations. None of this should be surprising, considering you'll be running a business in addition to providing consulting services.

What you may find surprising, however, is that specialized knowledge was less emphasized and the least varied among the list of internal resources that key informants shared with me. Specific knowledge concerning human and organizational development was often cited. In addition, it is expected that you will either enter each new job with a greater understanding of the task at hand, or quickly gain knowledge about the unique strengths, challenges, and histories of the population and context within which you are working. More importantly, regardless of your specialty or consulting niche, you must develop a strong grasp of various key research methodologies. Qualitative and quantitative research design and appropriate technical knowledge (i.e., data analysis and analysis software) are fundamental. Even if you will not be conducting randomized trials or using an experimental design on a regular basis, in order to adapt the appropriate methods for the real world, you will need to understand and respond knowledgeably to your clients' evaluation or research questions. More commonly, you will need to assist clients in articulating questions to ask of data based upon the client's implicit or explicit goals and objectives.

Action-research, or action inquiry, is a specific type of research that many consultants find useful. In comparison to traditional research, which is aimed largely at gaining information, action-research uses applied inquiry strategies involving cycles of data collection, evaluation, and reflection focused on generating genuine and sustained improvements in the quality of an organization (or program) and its performance (Lewin, 1958; Torbert & Cook-Greuter, 2004).

Some degree of expertise will also be required on collaborative and participatory models of research and evaluation, which involve clients and

other key stakeholders taking an active role, to varying degrees, in determining the nature (i.e., questions asked) and the process (i.e., data collection, analysis, and write-up) of the project. In Chapter 9, “From Start to Finish: A Typical Evaluation Project,” Kathleen Dowell describes in detail her involvement in an evaluation consulting project that utilized a participatory approach. For more information on participatory research methods, a good resource is the International Institute for Sustainable Development (2008). In addition to making your work participatory and collaborative, you should be mindful of how to help your clients use the evaluation effectively. Patton (2008) gives excellent guidance in his book, *Utilization-Focused Evaluation*. During every step of the process, from initial planning to implementation and presentation of findings, you need take action to maximize the likelihood that your deliverables are useful to your clients.

Basic knowledge of operating a business is also very helpful, and sometimes, essential. For example, some understanding of budgeting will be necessary to translate project tasks into the actual numbers of days and hours needed to complete them, as well as the costs associated with each task. Even if you do not expect to file your own tax returns or maintain quarterly or annual reports, knowledge of basic bookkeeping and accounting principles, such as accounts payable, accounts receivable, and invoicing, are necessary for making sure you get paid, keeping track of your available cash flow, and reporting your earnings or losses to the government (i.e., income taxes). Basic business knowledge can also help you efficiently learn about the organizations you consult with. While personality traits such as authenticity and knowledge of research methods and business basics are essential, they are not sufficient to keep you afloat as a consultant. You must also know how to put those personal characteristics and knowledge together to work for you and your clients. Knowledge in action can be described in terms of skills or abilities.

Abilities and Skills

Abilities and skills usually refer to the cognitive capabilities necessary to perform a job function, requiring the application of some knowledge base, and the capability to perform job operations with ease and precision (adapted from Goldstein & Ford, 2002). Most of the abilities and skills that informants and survey respondents listed as crucial to successful consultants fit in three broad categories: (1) interpersonal communication, (2) strategic thinking, and (3) organization.

Communication

Within interpersonal communication, the ability to quickly establish rapport and build trust is highly valued and can increase the likelihood of an effective and efficient collaboration. The most successful consultants have superior listening, reflecting, negotiating, dialogue facilitation, and conflict resolution skills. Being able to translate people's questions or desires into concrete tasks and ideas is important as well, as is the ability to communicate across disciplines, cultures, and styles. When consulting with nonprofits, it is not uncommon to interact with a varied set of stakeholders who straddle language, culture, and socioeconomic status.

Part of communicating across cultures effectively requires the ability to communicate technical information in layperson terms. But more concretely, it is the ability to interact with various people at many levels of corporate, academic, or community positions. Lastly, formal communication, such as business writing, and presentation and networking skills are essential, as most work is generated via word-of-mouth. You need to be able to think on your feet and sell yourself at times. But you also need to know when to step back and ensure that your partners take ownership and are recognized for their roles and accomplishments. The ability to move fluidly between working in isolation to interacting with large groups of people must be learned quickly on the job.

Strategic Thinking

Favorable cognitive abilities for problem solving included analytic and strategic thinking, as well as organizational diagnostics. Several informants spoke of intangible talents such as an ability to quickly size up the power dynamics and politics that exist within an organization. Consultants enjoy the new challenges and unique nature of each organization with which they collaborate. However, the individuality of each project necessitates thinking on one's feet because projects tend to change much more quickly in the public service sector than they do in university or laboratory environments.

Good consultants also have the ability to focus on when and what the client needs while acknowledging internal and external barriers to success. Being aware of the range of interests involved in a project can be helpful, but at times consultants also need to be able to tune out issues that are beyond their control, or are outside the scope of the contracted work. Furthermore, attending to both the processes as well as the outcomes of programs is important when you value building capacity within the organizations you choose to work with. Often, clients get caught up focusing on outcomes, when they could benefit from reassessing their assumptions and processes they employ to try and attain their goals.

Organization

In order to stay in business, it is necessary to begin new projects before completing others. Therefore, the ability to manage multiple projects effectively, as well as meeting stated deadlines, is a required internal resource. This ability stems from being organized and thoughtful about your own planning processes, so you are able to follow through with plans and don't waste a client's time. In addition, keeping track of your hours, records, and invoicing requires strong organizational skills. While you cannot always plan for the unexpected, running a well-organized project will reduce the frequency of having to work late into the night to meet deadlines, and help you conserve resources so you can step up when unavoidable stresses arise.

Self-Evaluation

How do your capabilities and development needs compare with the core competencies listed above? Don't worry—nobody has *all* of these traits, especially prior to beginning the work. However, it may be wise for you

Checklist 2-1: General Traits and Skills Needed to Thrive in Consulting

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- I am comfortable speaking with people across disciplines and at all levels of an organization.

 - I have the authenticity, self-confidence, and patience to build trust in others.

 - I have excellent oral and written communication skills.

 - I have the ability to say “No” when it is in my best interest, even if it will disappoint someone.

 - I have the self-discipline, attention to detail, willingness to put in long hours, and drive to complete projects on time at the highest standards of quality and integrity.

 - I have thick skin and a willingness to learn from my mistakes.

 - I have an awareness of my weaknesses as well as my strengths.

 - I have strong organizational skills.

 - I have the flexibility and tolerance for ambiguity and financial insecurity to adjust project time lines as necessary.

 - I have a desire for continual learning.

 - I have an appreciation and openness to diversity of thought and culture.

 - I have a service orientation and value base that suits me to working with nonprofit organizations.

 - I have an interest in proving myself over and over again.

Adapted from E. Biech (1998). *The Business of Consulting: The Basics and Beyond*. San Francisco: John Wiley & Sons. Reprinted with permission.

to engage in some self-assessments to obtain a clear sense of where your strengths are and what you have to offer clients. Then, you might compare your strengths with several of the important qualities discussed throughout the chapter to assess your readiness for beginning a consulting practice. Which skills do you already hold, and which ones do you still need to develop? The Amherst H. Wilder Foundation has developed a worksheet for this purpose (see Lukas, 1998). Another set of quick activities you can use to see how suited you are for the profession is to complete Checklists 2-1 and 2-2. The first list includes general traits and skills needed to survive and thrive in the profession. This checklist is adapted from Biech (1998) to use as a self-check for the characteristics that are ideal for you to have as a consultant. The second checklist includes more specific skill sets for doing the work of consulting, and is adapted from a “Core Competencies” worksheet designed by Lukas (1998).

Checklist 2-2: Specific Skill Sets Required to Consult Effectively

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- I have the ability to reflect and synthesize what clients tell me, and clearly articulate this back to them.

 - I have the ability to quickly diffuse resistance and resolve conflict with clients without getting defensive.

 - I have the ability to establish a safe, open learning environment in groups.

 - I have an understanding of organizational systems and the interrelationships between parts of the system.

 - I have the capacity to apply a variety of theoretical models of organizational behavior and performance to new settings.

 - I have an understanding of the process and dynamics of collaboration and the ability to facilitate collaboration with clients even when it is not on their radar.

 - I have an understanding of basic community organizing methods.

 - I have an understanding of adult learning principles and the ability to use them when facilitating workshops, trainings, or conducting presentations or writing reports.

 - I have the ability to design learning experiences to meet individual differences in learning and organizational styles.

 - I have skills in using a variety of data collection and analysis methods.

 - I have technological literacy and competence using current software packages as well as recording and presentation equipment.

 - I have the ability to clarify and articulate the values and beliefs that guide my work.

Adapted from C.A. Lukas (1998). *Consulting with Nonprofits: A Practitioner's Guide—The Art, Craft, and Business of Helping Nonprofit Organizations and Community Groups Get the Results They Want*. St. Paul, MN: Amherst H. Wilder Foundation. Reprinted with permission.

If there are more than 3 out of the 12 items on Checklist 2 that you cannot honestly check off, you may not be ready yet to begin consulting independently. However, if you feel like you have a chance of developing the knowledge, skills, abilities, and personal characteristics listed above, then go ahead and read on. There are still many more ingredients needed for success.

External Resources

In addition to the necessary internal resources listed above, successful consultants were also quick to mention external resources that allow for success. An understanding partner, spouse, or family, as well as a community of other consultants, will most likely become your support system. A good network of professional colleagues and a strong, established reputation are necessary so that you can continue acquiring new clients. In order to be an effective resource that community organizations will seek out, you also need to be well-connected with colleagues whom you can refer jobs that you do not have the time or skills to complete. A good professional network is also crucial so that you can pull in needed expertise as required on the jobs that you do take on, or to just have someone to bounce ideas off of or commiserate with.

In addition, you need to have enough financial resources to rely on when you are getting started. Starting slowly, while maintaining your job, or making the transition by working part-time while building a network of clients, or having a cushion through the income of a significant other can all be potential options in the beginning. Space is another important external resource, and decisions about whether to rent office space or work from home should take into account your financial resources, workload, personal preferences, and home situation.

HOW TO PREPARE YOURSELF

Programs, Courses, Workshops, and Certificates

The most obvious place we turn to for building our knowledge is through formal consulting, evaluation, or social science programs or courses at colleges or universities. One foundational degree that prepares students to consult with nonprofits is community psychology. Community psychology focuses on understanding, preventing, and addressing psychological and social problems, and empowering individuals, organizations, and communities. Students in community psychology programs learn consulting and evaluation skills, as well as advanced skills in research methods. However,

there are lots of degree options to pursue, and you should explore programs that provide a good fit with your interests. Given the cross-disciplinary nature of consulting, courses in consulting may be offered through a variety of departments, schools, and programs, including, but not limited to the following: applied psychology, clinical psychology, community psychology, applied social psychology, evaluation, education, social work, sociology, urban planning, public service, public health, policy analysis, business management, or nonprofit management.

You probably cannot make it through graduate school without completing courses in quantitative research methods, statistics, and diversity. These classes will provide a good base; however, you can position yourself best by taking some elective classes that are most relevant to consulting. For example, classes such as program evaluation, consultation, qualitative research methods, grant writing, community fieldwork/practicum, and small business accounting, will all provide you with knowledge and skills you can use as an independent consultant. Local community colleges typically offer affordable and effective courses in accounting and running a small business. Distance learning and Internet-based courses or webinars are also growing in popularity and respect.

Many professional organizations also offer courses, certificates, and continuing education credit workshops that are much shorter, less expensive, and more narrow in scope when compared to university-based courses. For example, the Evaluators' Institute offers 1- to 4-day courses, as well as certificate programs in research methodology and a variety of topics related to program evaluation (e.g., data analysis, report writing, policy analysis, etc.). They even offer a course on "How to Build a Successful Evaluation Practice." The American Society for Training and Development (ASTD) offers certificates for Professionals in Learning and Performance, such as a 2-day course in "Consulting Skills for Trainers." Other examples of training programs involve collaborations between government agencies, such as the Centers for Disease Control and Prevention (CDC), and professional organizations such as the American Evaluation Association (AEA), who sponsor joint summer institutes that offer over 50 different week-long courses on a variety of topics relevant to consulting with nonprofits and community organizations (e.g., community collaboration, survey design, interviewing techniques, project management, etc.)

You may also want to look into free or very inexpensive classes offered by your local Chamber of Commerce or Small Business Administration (SBA) office. The SBA is a federal agency that exists to help small businesses get started and survive. It is worth taking advantage of this valuable resource funded by your tax dollars.

Of course, there is also a plethora of related information available for free on the Internet. This information can serve as a great supplement to your existing knowledge base. However, when it comes to gaining skills, non-structured independent research and reading books on your own are inferior to taking classes or completing training programs that include guided practice and feedback, in addition to presenting new information.

Work Experience (Volunteer or Paid)

While much of the knowledge, abilities, and skills mentioned above can be developed at a university or in the workplace, many key informants mentioned the importance of having some guided, practical consulting experience. A common suggestion was to complete a few years of a formal or informal internship in a practice where you will be mentored. Having an understanding of the consulting cycle from beginning to end is helpful before you go out on your own or join a small firm. The more direct guidance you can receive, the better. Try to apprentice yourself to someone you judge to be solid in terms of ethics, competency, values, and philosophy.

Participating in real-world projects while under supervision is both challenging and safe. As you hone your observational and listening skills, you will learn how various nonprofits work. You will likely gain knowledge of the strengths and needs of multiple organizations and communities with which you work. Obtaining related work experience will also allow you to show your commitment to an issue or population of interest, and build trust through developing personal relationships and learning the desires of various stakeholders. In addition, it will allow you to build contacts and a network of potential future clients.

Finding a senior consultant who has the commitment and resources to mentor you may not be realistic for everyone. In general, it is a good idea to look specifically for jobs that provide you with a chance to build skills related to consulting, such as project management, interviewing, community organizing, report writing, presenting, and grant writing. In addition, if you are itching to be your own boss, another way to gain valuable relevant work experience is to volunteer (if funding isn't available) on a few projects with an experienced consultant you respect before trying to market yourself as an expert. This will allow you to build a base of experience, as well as a resume of completed projects.

Establishing Networking Relationships

Networking is about building relationships with people who share some of your goals and interests. Networking can be a great way to increase your knowledge. By interacting with various people, you will likely be exposed to a multiplicity of styles and opinions on the best ways to conduct research, evaluation, and development work. Start expanding your network early. An easy source from which to begin gaining knowledge, abilities, and skills for consulting are university professors who trust your skills and have an understanding of your strengths. Therefore, building a favorable reputation through working with numerous professors at your university is a good way to start creating a network.

While the mentorship model found in most doctoral programs is useful for specializing and learning how to become an academic or top-notch researcher, it is not necessarily set up to expose you to the multitude of relationships that members of the university community have with the outside world. Partnerships and collaborative projects between the university and businesses, government, and the local communities are on the rise. Try to learn about the work beyond that of your direct supervisors.

To summarize, consulting with nonprofits requires skills that are interdisciplinary. Take advantage of opportunities to learn from faculty outside of your specialty. Furthermore, expand your base by looking across disciplines to see the overlap and interrelatedness or contrasts of how different social sciences frame and/or attempt to solve similar problems. Most professors are more than happy to discuss their work and their discipline with interested graduate students. Since you are likely spending several years at one institution, your graduate school experience can be an opportunity to build your own capacity to do the work, as well as establish relationships with people who can be stable sources for work in the near and distant future (see Chapter 6, “Finding Work,” for exercises to help you build your network).

Learn about Funders

One of the abilities that you likely already have is to digest information quickly. This is a good skill to hone in preparation for starting a consulting practice. Increasing your knowledge through the Internet and professional journals is a good habit to get into. It is also advisable to expand your knowledge base through learning the “ins and outs” of nonprofit and local government funding in your area.

Determine the “who,” “what,” “where,” “why,” “when,” and “how” of the major funders in your area. What foundations are active? Learn about their missions, funding priorities, and funding cycles. You can call them and ask for annual reports and funding guidelines. This will be useful for understanding what they are looking for when you are working with an organization that they fund. In many areas, the United Way is a major funder of nonprofits. Find out how involved the United Way is in your area. Foundations, government agencies, and institutional funders are either potential clients themselves, or sources of funding for your clients. If you develop a relationship with a representative from a foundation or state funding agency, he or she can help you work through the grant process. In addition, sometimes funders hire consultants directly to do grant reviews or to help write Requests for Proposals (RFPs).

If you are able to build a reputation as a knowledgeable person in one or several substantive areas, you may be asked to help write an RFP, or review grant proposals. This can help you learn the perspective of funders, and may also provide ideas for ways to present your next grant proposal. Since many nonprofits are strapped for cash, coming to them with ideas about where they can get additional funding, or where the funding for an evaluation you are proposing may come from, will make you more desirable as a consultant.

CONCLUSION

Getting started in consulting may seem a more daunting process after considering all of the internal and external resources discussed in this chapter. However, we hope that our suggestions provide you with a pathway to accomplishing this task. We recommend that you start by conducting a self-evaluation and exploring your internal resources, then building your knowledge and abilities in areas where you see gaps in knowledge or ability through coursework, increasing your skills and confidence through relevant work experience, re-evaluate for consulting skill sets, and then return for more training to fill in gaps when necessary. We also suggest that you work to build relationships with colleagues and potential clients, and learn as much as you can about funders. However, this process can happen over an extended period of time and does not have to strictly follow our suggested order.

So what would all of this preparation look like in practice? Well, Geoffrey Bellman wrote in his book, *The Consultant's Calling*, that during the 7 years prior to beginning his consulting career, he wrote and published an article each year, co-led about 3 to 4 public workshops a year, presented papers

once or twice a year at conferences, spoke to a few civic organizations, and attended at least one public workshop a year. Presenting and publishing were important for building his credibility as an expert, as well as developing his professional network, while leading public workshops and speaking with civic organizations were helpful in developing a positive reputation and relationships in the community. Lastly, attending workshops was beneficial for continued learning, as well as maintaining his network. These activities seemed to prepare him well for the career ahead of him. While the number and types of specific activities that are best for you to engage in will vary depending on your starting point, it will be helpful to keep in mind the various important domains raised in this chapter, and to consider your options as you prepare for success.

