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# The Consultant's Q&A Checklist

by Jack B. ReVelle

At some point in your career, you may aspire to become a full-time management consultant. Avoid making a hasty decision by going through this Q&A checklist. It includes the critical areas to consider, as well as the frequently asked questions that need to be addressed before leaping into this growing field.

## Get the proper credentials

**Q: First, do I have the right credentials to make the move?**

A: Credentials are what potential clients look at first. Your experience should include industries and functions that assure potential clients you have a full understanding of their situations. Your certifications should indicate your skills and knowledge. Your education should first reflect your highest degree, followed by lesser degrees. Potential clients also will want assurance that there will be good chemistry between you and their organization.

**Q: Should I obtain relevant certifications?** A: Clients want their management consultants to have appropriate credentials. If your educational achievements are limited to a bachelor's or master's degree, acquiring certifications is a good idea. If you hold a doctorate, certification can still be an attractive feature on your résumé. As a management consultant, consider obtaining a certified management consultant designation through the Institute of Management Consultants.

## Identify your ideal niche

**Q: What should my specialty be?** A: The number of consulting specialties seems endless. What you know best and what you are known for—whether it's auditing, healthcare, customer service or lean Six Sigma—is probably the best place to start. You can expand your range of services after starting, just as I did.

**Q: Should I focus on one or more particular industries?** A: At the outset of

## YOUR CHECKLIST

### Get credentials

- ✓ Higher education
- ✓ Certifications

### Identify your niche

- ✓ Specialization
- ✓ Industry
- ✓ Clients

### Market your business

- ✓ Website
- ✓ Business card
- ✓ Content
- ✓ Networking
- ✓ Consultations
- ✓ Competition
- ✓ Pricing

### Design a lifestyle that works for you

- ✓ Business structure
- ✓ Geographic range
- ✓ Time commitment

### Get help

- ✓ Ask for advice

your management consulting career, it likely will be the easiest way to start. However, there are pros and cons to specializing in a particular industry. For example, one of your client's competitors may want to make use of your experience and knowledge of their industry (pro), but your client may object to you assisting one of their competitors (con).

**Q: Who are my potential clients?** A: The number and type of potential clients are theoretically unlimited. Being realistic, however, there will be some important restrictions—some self-imposed. Restrictions include factors such as your areas of specialization, tolerance for travel, reputation and preferences regarding types of clients (size: large, medium or small; ownership: public vs. private; age: old vs. new; among others).

## **Market your business**

**Q: How do I attract clients?** A: You must become findable. A great way to do that is to have a professional website that details previous projects and what you can do for potential clients. Visit my website at [www.revellesolutions.com](http://www.revellesolutions.com) for some ideas. Many management consultants promote their availability in classified ads in professional journals. I've never used this tactic, but based on the continued appearance of some ads, I assume some consultants find them worthwhile.

When you're having your business cards designed, make good use of the back side to let potential clients know about your skills, education and experience. Using social media sites such as LinkedIn is another way to establish lines of communication and spread the word regarding your management consultancy.

**Q: How will potential clients find me?** A: Whether you're starting solo or working with others, you must let your world of potential clients know your consulting services are available for hire. There are many ways to attract potential clients. The following are just a few ideas that have worked for me:

- Write articles for publication in professional journals relevant to your target client base.
- Write and publish professional books and have them reviewed in the same professional journals.
- Deliver presentations to chapter, regional and national meetings of professional societies such as ASQ, the Institute of Industrial and Systems Engineers or the American Society of Safety Engineers.
- Deliver webinars and webcasts under the auspices of the same professional societies.
- Network by attending chapter and national meetings of the same professional societies.

The reasoning behind these ideas is repetition: The more your name is seen and heard by your potential clients and colleagues, the more likely it will be recognized, remembered and recalled when a person with your skills, experience and education is needed. It's not much

different than marketing products and services.

**Q: How can I engage and sell clients on my services?** A: Offer free consultations. After contact is made between you and a potential client, it's time for you to become the right person for whatever jobs they need. You must be alert and engaging. Listen for key words or phrases that clarify the potential client's major concerns. Demonstrate your ability to get along with individuals at a variety of organizational levels. Indicate how you've successfully resolved similar problems in the past. If it's necessary to demonstrate concepts using graphics on a flipchart or white board, be sure to obtain prior permission from the potential client's contact person.

You may believe you have the capability to identify all the potential client's problems and quickly solve them. I recommend, however, focusing your initial efforts on whatever problem the potential client believes is most important. There's nothing more irritating to clients than a consultant summarily dismissing their assessments of their processes. If you believe clients are off base in their understanding of what must be done, present your best explanation of the situation and what you believe should be done to rectify it without stepping on toes.

**Q: Who are my competitors?** A: When you're running a race, it's clear who the competition is. When you're competing for a consulting job, it's not always clear. Only twice in all my years of consulting have I learned who my competitors were, and that was by accident. Your competition could be working solo or part of a consulting organization. Whichever the case, don't depend on knowing who your competition is to give you a competitive advantage. However, classified ads in professional journals will provide you with some awareness of your competition.

**Q: What do my competitors charge for their services?** A: When you're a consultant, discovering what your competitors charge for their services is not like comparison shopping for groceries. Consultants don't openly advertise so everyone can compare prices. This is one of the most difficult, if not impossible, challenges you'll face. Gaining this information is unlikely, unless you have a knowledgeable friend on the inside of a competitor or clients willing to divulge this information.

## **Decide on a lifestyle that works for you**

**Q: Should I join an existing consulting firm or create my own?** A: Decide whether you want to work alone, form a consultancy with others or join an existing consulting organization. There are advantages and disadvantages to each option. You need to decide whether you prefer to work independently or depend on others to occasionally provide you with some direction.

**Q: Should I start part time?** A: If you prefer to operate solo, the probability for long-term success increases if you begin consulting on a part-time basis while you're still employed full time. This is how I began my consulting career and built a client base without sacrificing my income. In fact, this modus operandi helped me acquire sufficient savings to protect my family's lifestyle when I became a full-time consultant. When you're just starting, one or more of your potential clients will ask you if you've done similar work for other organizations. Anticipating this, I provided pro bono assistance to nonprofits such as Goodwill Industries. The only request I made of these organizations was they agree to become a reference.

**Q: Am I willing and able to travel?** A: Are you willing or able to be away from home much of the time? Are you willing to drive or fly from your home territory to serve clients hundreds, or even thousands, of miles away? Are you willing to put up with the security restrictions and inconveniences associated with travel? As a long-time management consultant, I quickly determined that my tolerance for travel was limited.

**Q: When and how should I make the move to consulting?** A: Timing is critically important when making the move to become a full-time management consultant. The status of the economy, especially in your specialty businesses and industries, must be considered, particularly if you're starting with minimum capital and a short list of potential clients.

**Ask for advice**

I hope this food for thought helps you start thinking about whether you want to make your dream of becoming a management consultant a reality. You'll be the final decision maker, but it might be a good idea to discuss your thoughts with someone who has been down this path before. He or she will no doubt help you cut through the clutter and find the best solution for your future.

**Checklist examples provided by:**

Jack B. ReVelle, Ph.D.  
A Consulting Statistician  
Santa Ana, California