

SPAC 20

Being Your Own Boss: *Success as a Proposal Consultant/Contractor*



By Chuck Keller

Consultant, Contractor, or Freelancer?

“Consultant: any ordinary guy more than fifty miles from home.” - Eric Sevareid

“A consultant is someone who saves his client almost enough to pay his fee.” - Arnold H. Glasgow

“Give a man a fish, and you’ll feed him for a day. Teach a man to fish, and he’ll buy a funny hat. Talk to a hungry man about fish, and you’re a consultant.” - Scott Adams



Pros of Being a Consultant

- Work variety & choice (*what, when, where, for whom, & for how much*)
- Travel & adventure
- More control of your personal life
- Employment independence & a sense of entrepreneurship & achievement
- Professional growth due to client/work variety



Cons of Being a Consultant

Requires:

- Personal & professional discipline.
- Marketing & networking effort.
- Attention to legal, business, & financial management issues.
- \$ investment for job tools.

Can lead to:

- Work & income instability.
- Extensive travel & time away from home/family.
- Overwork: imbalance of work - personal time.



Qualifications



- Professional proposal experience
- SME & military experience
- U.S. Government security clearance
- Education & accreditation/certification
- Writing, management, oral, & interpersonal skills
- Ability to “sell” yourself & take rejection
- Strong initiative, drive, & self-confidence
- Business plan development & implementation

Business Plan Elements

- **Business Structure & Name**
- **Services & Target Market**
- **Marketing Plan**
- **Projected Expenses & Revenue**



Business Plan: *Business Structure & Name*

- Sole Proprietorship
- LLC
- Incorporation

Factors to consider:

- Personal liability
- Setup & cost
- Administrative workload
- Tax rate
- Business future
- Brand credibility



Business Plan: *Services*

- Proposal & volume management/coordination
- RFP analysis, proposal strategizing & outlining
- Writing & editing
- SME consultation
- Illustration
- Desktop publishing
- Proposal review
- Oral presentation prep



Business Plan: *Target Market*

- Government proposals (*local, state, federal, & international*)
- Commercial proposals (*businesses*)
- Grant proposals (*government, non-profits, & businesses*)



Business Plan: *Marketing Plan*

- Former employers & their subs
- Other consultants
- Professional organizations
- Industry/trade publications & media
- RFPs, bidder lists & bidder meetings
- Internet/social media
- Organizations supporting businesses in the market
- “Placement” companies
- *Repeat clients*



Business Plan: *Projected Expenses*

- Home & portable offices (*furniture, hardware, supplies, Internet, software & communication tools*)
- Marketing (*collateral, advertising, travel, & professional organization dues & events*)
- Professional services (*accounting, legal, banking & tax*)
- Legal structure (*registration, licensing & taxes*)
- Retirement & health plans.
- ***Plus, existing living expenses.***



Business Plan: *Projected Revenue*

- Going rates for your services in your market
- Income needs/goals for near-term & long-term
- Required workload to meet income goals/needs
- Money in “reserve” to start
- Employment fallback plan



Relationship with Clients

“Consultants have credibility because they are not dumb enough work at your company.” - Scott Adams

“My greatest strength as a consultant is to be ignorant and ask a few questions.” - Peter Drucker



Client Red Flags



- It'll be easy to write; we have boilerplate.
- Can you provide proposal boilerplate or a template?
- We lack internal resources to write it.
- It's already written; it just needs an edit & marketing spin.
- The RFP's been out for weeks. We haven't done much with it & the proposal is due *next/this* week.
- Will you work on contingency, getting paid only if we win?
- How long & how much \$ will it take to write it?

Consultant Don'ts



- Offer proposal/SME skills you don't have.
- Take responsibility for final proposal content.
- Use proposal content of your other clients.
- Be careless with client's proprietary info.
- Take a job without knowing what you & the client will do & provide.

Don't be scared to turn work down.

Your Proposal for the Client's Work

- Services/resources to be provided by you & the client
- How, where & when of these provided services
- Proposal preparation schedule
- Cost (*labor, travel & materials*), payment method, & cost "caveats"



Analyze the RFP & clearly understand the client's needs/resources before submitting.

Administrative Work



- Consultant - client agreement
- Client purchase order
- Non-disclosure/non-compete agreements
- IRS Form W-9
- Travel arrangements
- Security/logistic arrangements (*badge, security clearance, parking, & access to internal resources*)

Consultant - Client Coordination

- Get buy-in from client staff & other consultants to work with you.
- Commit to a proposal preparation schedule & assignments.
- Have an escalation process for resolving problems & disagreements.
- Pick your battles.
- Be honest & ethical.



Professional Growth



- Improve & acquire skills through:
 - Training/CE courses, workshops, seminars, & conferences.
 - Accreditation/certification.
 - Undergrad/grad degrees.
 - Presentations & writing.
- Expand/improve knowledge of software.
- Take leadership roles in professional organizations.



The Values of/for a Consultant

“The core of the consulting business is going in and essentially making yourself indispensable by eating the brain of the organization, meaning that the consultants go in and assume key functions in the organization.” - Matthew Stewart

“I have never believed in the Wizard of Oz theory of consulting, that I am all-knowing and all-seeing, and that everyone around me is kind of a backbencher.” - David Axelrod

“Every year in consulting is like three years in the corporate world because you have multiple clients, multiple issues - you grow so much.” - Indra Nooyi

So You Want To Be a Proposal Consultant?



- Evaluate your skills & suitability.
- Develop & implement a business plan (*business structure & name, services & target market, marketing plan, & projected revenue & expenses*).
- Understand client needs.
- Form supportive & cooperative relationship with clients.
- Make time for professional growth.

Reference/More Info



- ***“Consultants & Their Clients: Getting the Most Bang from Hired Proposal ‘Guns’”*** - a presentation by Chuck Keller and Keith Propst at the 17th Annual APMP Conference, New Orleans, 2006.
- ***“Exorcize Your Proposal Demons! The Consultant-Client Conflict Demon”*** - by Chuck Keller, “APMP Perspective” (Spring 2010, pp. 10 - 13).
- ***“APMP U.S. Compensation Report 2015”*** - www.apmp.org, APMP Publications.