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Personal Characteristics



Highlights:

- Examine some of the benefits and risks associated with an independent consulting career.
- Consider the five important characteristics of successful independent consultants.
- See if you have the endurance you need to take on this career's challenge.

[Ann] earns more than \$100,000 a year and works anywhere between 10 and 50 hours a week. Her home-based office overlooking Lions Gate Bridge has an easy chair and a fireplace. When she needs to take a break, she heads out for an energizing run or swim. She'll need all the energy she can get, because U.S. clients are calling her. . . . She is living the dream of every fledgling consultant. More important, she's fulfilling her career-long dream of creating better-managed companies. . . . "My level of job satisfaction and pure happiness has escalated beyond my wildest hopes."¹

While this is certainly the dream that many people hold, they often wonder, “Is consulting right for me?” There are some real benefits to this career choice, as Harris (2001) points out:

- Freedom—the ability to choose when, where, and how you work
- Variety—a range of projects with variation in features such as length, topic, level of detail, and client
- Independence—not having to account to others for your activities
- Home-based work—the convenience of working on your own premises if you so choose

The reality, though, is that a career as an independent consultant is not for everyone. Greiner and Metzger (1983), the management gurus that I consulted when I started out, also described consulting as “the most damnable profession in the world.” Based on that observation, there are obviously some risks involved. Harris cites several:

- Loneliness—there is nobody in the next office with whom to discuss your work projects.
- Peaks and valleys—you may not know if you will be earning any money next month or how much it might be.
- Pressure—you never have an hour that is really free, because your business is always on your mind.
- Marketability—it may be difficult to reenter the job market afterward if consulting does not work out for you.

It is important to know from the outset if you have what it takes to survive in this tough field. Most books on consulting launch directly into how to set up your business, how to get contracts, or how to work with clients. They leave personal competencies until much later, if they include them at all. By then it is way too late, because, in your own mind at least, you are already moving down the consulting road.

One of my associates used to joke that to be a successful consultant you needed to be a middle child. She meant that this birth order forced you to become a negotiator and a peacemaker. As was once said on the *Early Show*, “A firstborn is a company’s CEO, [but] the middle child is the entrepreneur” (CBS News, 2002).

Understanding your strengths will help you make your career decision. After researching the personality traits of independent

consultants and discussing them with colleagues, students, friends, and family, I have identified five important characteristics.

❖ 1. INTELLECTUAL CAPACITY

It seems obvious, but you have to be smart, well trained, and experienced to sell your research skills. Let's assume that you already have specialized in a professional area such as education, health, social work, or public administration, or that you have honed your skills in a discipline such as psychology, sociology, anthropology, or statistics. This knowledge is the foundation of your expertise, and you are already able to assimilate, analyze, interpret, and synthesize information. You have strong research skills and good critical thinking skills, and you can exercise your professional judgment as needed. Problem solving is second nature.

This competency profile for evaluation professionals in the federal public service sums it up:

Evaluation professionals plan, design and implement sound evaluation methodologies to assess and inform organizational programs, policies, and initiatives. They quickly comprehend the objectives of new programs, policies, and initiatives to which they are exposed and the context in which they operate. They are adept at systematically collecting and assimilating substantial quantities and types of information. Evaluation professionals use their strong cognitive skills in critically evaluating and interpreting research findings and in identifying gaps in, and limitations of, the evidence. They formulate plausible hypotheses, consider alternatives, and draw appropriate conclusions from research findings. (The Centre of Excellence for Evaluation, Treasury Board of Canada, 2002, Cognitive Capacity, para. 1.)

While this is where you may begin, even more is required. "Do I need an advanced degree?" you wonder. In my view, the answer these days is, "Yes." Not only do you need the intellectual capacity, you need to demonstrate to clients that the world has recognized you for it. As early as 1980, Cronbach and his colleagues (1980) were suggesting that a doctoral degree in a social science was a minimum academic requirement. There are several reasons why this idea is even more critical today.

One reason is the upward migration of credentials. Nursing is a good example of this phenomenon. Twenty years ago, there was a rush for registered nurses to get bachelor's degrees. Ten years ago, obtaining a master's in nursing or health sciences was considered a good career move. Today, programs offering a PhD in nursing are increasing in number and, in addition, an advanced professional degree has emerged. The doctorate of nursing practice (DNP) in the United States and the doctorate in healthcare (DHC) in the United Kingdom are becoming desirable credentials. In October 2004, the American Association of Colleges of Nursing membership voted that the DNP would be required as the entry-level degree for all new advanced practice nurses by 2015 (Dreher, Donnely, & Naremore, 2005). At that time, there was only one such training program in the country, but many master's programs have been positioning themselves to offer this degree before the deadline. If you are considering becoming a consultant in the health sector, a doctorate will soon be essential.

Another good reason for an advanced degree is market demand. As we learned in Chapter 1, competition for management consultants is likely to remain keen, and those with the most education and experience will have the best prospects (Bureau of Labor Statistics, 2009). In the competitive process that is often used to select a consultant, brownie points are always awarded for educational background. An advanced degree will let you out of the gate with an advantage.

A third reason is credibility. Postdoctoral studies or joint advanced degrees are becoming more common in a number of fields, and many research programs are moving toward interdisciplinary or translational research. If you plan to sit across the table from clients with a research background, you will need to speak their language if you want your advice to be accepted.

In some cases, however, specialized training or other accreditation may be more appropriate. Perhaps your area of expertise is too new to have a doctoral preparation program. In other cases, an MBA may seem more relevant. Some consultants have suggested that a project management designation is useful. As well as formal training, field experience is essential. A deep portfolio allows you to relate to different clients in different contexts. This lived experience provides a strong connection upon which to build your relationship and provides a greater understanding of the situational complexities so hard to put in words. As one client commented to me recently, "You get it! We don't have to explain so much." This speaks to the value of maturity,

so if you are coming to consulting a little later in life, you have much to offer. On the other hand, if you have youth on your side, plan to expand your portfolio through as many varied experiences as possible.

❖ 2. SELF-CONFIDENCE

They say that consultants should have low ego needs. This is patently absurd. How can you have low ego needs and be self-confident at the same time? What people probably mean is that you can't be a "high-maintenance" individual, nor can you expect to take center stage. So how are you going to do this? Katz and Kahn (1978) looked at self-determination as the basis for job satisfaction. They explained as follows:

The reward is not so much a matter of social recognition or monetary advantage as of establishing one's self-identity, confirming one's notion of the sort of person one sees oneself to be, and expressing the values appropriate to this self-concept. (p. 407)

By internalizing your professional goal, namely to be a good evaluator or applied researcher, your self-gratification comes from doing your job well. You can then convey that belief even when faced with criticism or opposition.

Self-confidence flows seamlessly into leadership. While a consultant is often seen as a "hired hand," you must still be cooperative and inclusive in your approach. This modern management style is well suited to environments filled with change and uncertainty (Rosener, 1990). Your job is to motivate those around you to take on the challenges associated with the research enterprise. Through collaboration you will need to move your clients toward solutions that they might never reach on their own. When you leave the organization for your next project, you will take a sense of satisfaction with you, and don't be surprised at the positive feedback you receive; you deserve it.

❖ 3. MOXIE

Moxie is a wonderful word that originated as the name of the first mass-produced carbonated beverage in the United States. It was said to be an invigorating drink that gave the drinker "spunk" (Moxie, 2010).

Moxie has moved into the public lexicon to mean such things as courage, energy, and vision. It is something you will need a lot of if you want to be a successful consultant.

When you think of courage and daring, you might think of the three musketeers heading off into battle against all odds, but moxie is actually a lot more subtle than that. It is the capacity to go against the common view, to walk into a room of fractious stakeholders who don't support the evaluation and don't want to hear about the findings. It is the ability to land in a strange town at midnight, scrape the snow and ice off your rental car, and locate your motel without the benefit of a map. It is being able to get up the day after you have lost the best proposal you have ever written and start all over again. You need to be resourceful, take risks, and persevere despite setbacks. Despite all this drama, you also need to thrive on solitude. Your life, your week, and your work day are blank canvases. It is up to you to fill them.

Does this prospect excite you or fill you with dread? Energy and enthusiasm for this challenging work gives independent consultants their edge. Their vitality comes from being out there on their own. David Maister, the management consultant's consultant, sees passion as a key ingredient (Church, 2000). Doing work to which you feel connected makes your job more rewarding and in the end will bring you better financial results. He says, "The people who are winning out there are not smarter than the others. They are winning because they have the passion to do what others know they should do, but don't" (p. M1).

The final component of moxie is that vision or that big-picture thinking that allows you to see patterns and develop innovative ways to win stakeholder commitment and do your research. Von Oech (2008) has written extensively about creative thinking. He sees it as a self-fulfilling prophecy. Creative people give themselves the license to pay attention to even their smallest ideas. They know that one of them will lead to a breakthrough. Patton (2008) has suggested using metaphor to develop new understanding and better communications. Creative comparisons appeal to a wide range of stakeholders, deepening their understanding in unexpected ways and offering new perspectives for problem solving. Although you still need that killer logic best utilized by Sherlock Holmes, even that famous detective used his intuition to frame it. As Jakob-Hoff and Coggan (2003) commented, evaluators need to combine their more tangible competencies with their intuition, "to sniff the air and smell a rat" (p. 137). Unfortunately for us, that important little voice was never nurtured by our schooling, and we need to find ways to incorporate it into our problem solving.

❖ 4. ADAPTABILITY

Our work is defined by rigid parameters set out by proposals and contracts, yet the whole world is in a state of flux. How can you conduct useful research with such uncertainty all around you? The answer, of course, is that you have to be adaptable, able to take any situation and make it work. For example, you find that your proposed telephone interviews won't work, because the target group is transient. What about coffee shop intercepts? Your client wants to observe your focus group despite your protestations. What about offering follow-up interviews for participants with something confidential to share? You can't use financial incentives, because participants are likely to spend it on drugs. What about giving them coupons to the local grocery store instead? With experience, your research designs will become more and more open-ended to account for the unexpected issues you can be sure you will encounter in the field.

I was recently invited to a jazz concert at a local community center. The pianist soon discovered that the piano had not been tuned. A couple of critical base notes were markedly off key. She was really frustrated by this impediment but kept on playing and soon figured out some alternatives. She even incorporated some humorous lyrics about problem keys into her next song. At the end of the evening, she received an extra round of applause for her grace under fire. Being light on your feet will allow you to respond to change, ensuring that your business survives and your research stays relevant. The trick is to keep playing and make it look effortless.

❖ 5. ENDURANCE

It is important to decide as soon as possible if consulting is a stopgap measure or a long-term commitment, because being an independent consultant can change you in ways that may be irreversible. While some people choose self-employment, others fall into it through chance or circumstance, by virtue of their age, skills, employment options, or location. Barbara Moses, who is a well-known career consultant and national columnist, commented, "Even those forced into self-employment as a temporary measure often discover that they thrive on it, to the point where they can no longer imagine going back to work for an organization" (2002).

Still, from time to time, it is quite common for independent consultants to be tempted by the security, wages, or status of regular, paying

jobs. However, as employees they often chafe under the constraints imposed by organizations. Sometimes they go to work for former clients, but they may find the environment is quite different and much less appealing when seen from the inside. Based on my observation, these individuals will not stay and will move on again. They may return to consulting, but it can be an uphill struggle if their networks are out of date. Moving in and out of consulting suggests a lack of direction and does not look good on your résumé, so it is better to decide soon if you have the endurance required not only to get into consulting but to stay there.

The biggest factor in your decision will be your financial sustainability. Can you afford to support yourself for up to six months while you look for contracts? Do you have enough savings to tide you over, or a partner who is willing to take the load while you get on your feet? Do you have childcare or elder care costs to consider? These critical questions will help you make your decision.

Many people decide to ease into consulting by working part time in a paying job as they develop their consulting practice on the side. This approach has the advantage of more security, but there are a couple of drawbacks. Because you are not so hungry for work, you may not try as hard to find it. You may also get stuck with one foot on either side of the great divide between the employed and self-employed. While some people stay in this dual role permanently, it may be difficult to self-actualize in either one career or the other.

Before you set your sites on independent consulting, think about the key questions in the list below (Maynard, 1992). (For the full checklist, see Appendix 1.)

- What skills am I selling? Is there a market for them?
- How can I bolster my own skills by joining forces with others?
- Can I support myself for three to six months while I check out the market and land my first contract?
- Can I handle periods of isolation interrupted by brief spurts of client contact?
- Am I good at multitasking and dealing with competing demands on my time?
- Am I resilient?

Source: Adapted from Maynard, 1992. Reprinted with permission.

Consulting is not a career choice for everyone, but if you see a market for your skills and want to be your own boss, if you have the financial resources and personal stamina that this career requires, then read on. Your intellectual capacity, self-confidence, moxie, adaptability, and endurance will give you the building blocks you need.

❖ USEFUL RESOURCES

- The Independent Consulting Bootcamp website provides a wealth of information and free resources to assist you in starting and growing your own consulting business. <http://www.independent-consulting-bootcamp.com/index.html>
- Dr. Barbara Moses is an international work-life expert. On her website she shares many of her articles on the work world, career strategies, career change, advice to women, and age-related dilemmas. http://www.bbmcareerdev.com/booksarticles_articles.php
- There are several excellent competency frameworks available for management consultants and evaluation professionals, including the following:

The Management Consulting Competency Framework, at <http://www.imcusa.org/?page=CONSULTINGCOMPETENCY>

Competency Profile for Federal Public Service Evaluation Professionals, prepared by the Research and Development Division, Personnel Psychology Centre for The Centre of Excellence in Evaluation, Treasury Board of Canada Secretariat, at <http://www.tbs-sct.gc.ca/cee/stud-etud/capa-pote00-eng.asp>

❖ DISCUSSION QUESTIONS AND ACTIVITIES

1. Identify three consulting colleagues with whom you might collaborate on a project. How do their skills complement yours? How might you approach them to discuss future collaboration?
2. What personality traits identified in this chapter are strengths of yours? Describe situations where these characteristics have

been particularly useful. Which of the suggested characteristics do you need to develop to a greater extent? What strategies might you use to do that?

3. Think of several times in your life when you have shown courage, energy, and vision. What can you learn from these experiences that can help you cope with the challenges that consulting is likely to provide?

❖ NOTE

1. Adapted from Rona Maynard, The Guru Gambit. *The Globe and Mail, Report on Business* magazine, October 1992, p. 66. Name of consultant is changed.

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