Tips for independent consultants

Consulting, coaching, and facilitating workshops

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1 Understanding the different hats you will wear

As an independent consultant, you'll often have to wear several different hats in your work with clients. Sometimes you might actually be working as a consultant, but other times as a coach, and still other times as a facilitator.

Consultant

When you are wearing your consultant hat, you are the content expert, called upon to provide your clients with an answer to their problem. It is your job to observe their situation and offer specific suggestions that will resolve the issue. You might be working with an individual client, a group, or a working team.

Facilitator

When you are wearing your facilitator hat, your clients have a specific problem that they need to resolve, and you are the process expert with knowledge of the content. It is your job to guide the process, continually steering the conversation back to the problem at hand. When you're wearing this hat, you are typically working with a group or working team.

Coaching

When you are wearing your coaching hat, you are the process expert who recognizes that your clients already know the answers. It is your job to ask the right questions that will help them clarify what they need to do, knowing that the initial problem they set out to solve may not be the work you end up doing together. Again, you might be working with an individual client, a group, or a working team.

Consultant

- At beginning of a session, decide which tool to use—e.g., one of the MBTI® or FIRO® assessments
- Suggest a specific report based on the assessment used

Facilitator

- Serve as client's guide for deeper exploration—e.g., using the Step II™ facets
- Provide a focus for achieving a goal or solving a problem

Coach

- Encourage client-generated action—e.g., creating "next steps" for applying type knowledge at work
- Ask insightful questions and suggest possibilities, but making sure that the client makes the decisions

Once you understand these differences, you can develop an understanding of when to wear which hat. You may need to put on your consultant hat to start. You do a needs assessment and, as the content expert, you recommend a specific assessment—such as one of the MBTI® or FIRO® assessments—that best fits the situation, and then suggest the specific report that provides the information the clients need.

Once clients complete their assessment, you might take off your consultant hat and put on your facilitator hat, guiding individuals as they work toward a specific goal—for example, understanding the MBTI preference pairs. Once the goal has been reached, you might take off your facilitator hat and put on your coaching hat, asking clients how their new knowledge might be used to solve challenges in their work environment. Remember, when coaching, you are the process expert, not the content expert; your job is to ask, not tell. Your clients are the content experts, and your job is to ask the questions that help them find the answers within themselves.

As an independent consultant—whether you identify as a consultant, a coach, or a facilitator—you're required to wear many different hats. Knowing the difference between these seemingly similar fields can help you determine what each situation calls for, better meeting the needs of your clients.

2 Coaching and facilitation

Let's delve deeper into the different hats you wear when working with clients and the opportunities you have as an independent consultant to coach clients and facilitate workshops. Integrating these approaches when developing your client proposal can enhance both your client relationship and clients' understanding and application of the assessment content.

Using the MBTI assessment as an example, consultants often offer just one session and try to fit both coaching and facilitation within it. That in fact may be what you end up with, but understanding what each approach offers may help you influence potential clients to contract for either longer sessions or multiple sessions.

Which form of the MBTI® assessment do you want your clients to complete?

Step I™ (Form M)

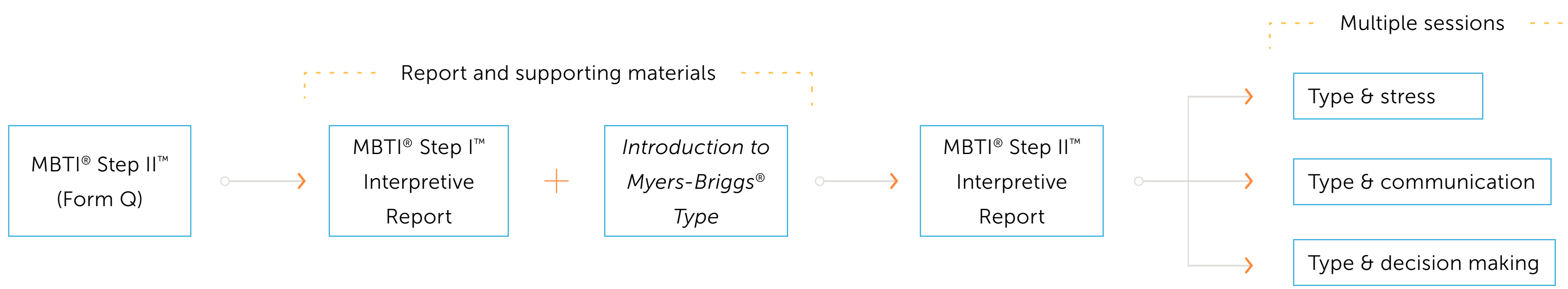
- Identifies individuals' 4-letter personality type
- Provides a common language for gaining insight into how people interact with the world and with other individuals
- Contains 93 items

Step II™ (Form Q)

- Goes beyond 4-letter personality type to uncover what makes each individual unique
- Offers insights especially helpful for coaching, action planning, and building cohesive teams
- Contains 144 items—all 93 items of the Step I assessment, plus an additional 51

Example of an MBTI® session flow

Facilitator



In my past experience as an independent consultant, I usually had clients take the Step II™ (Form Q) assessment rather than the shorter Step I™ (Form M) assessment. The Step II assessment opens the door for clients' more advanced use of the instrument later without requiring them to take the assessment a second time. Remember, with your online Elevate® account a cost is associated only when you run a report, not when a client takes the assessment.

Next, you must consider the choice of report and supporting materials to use. I often built my first session around learning the basic type preferences, using the MBTI® Step I™ Interpretive Report and the *Introduction to Myers-Briggs® Type* booklet. Note that this session is focused on facilitation—guiding clients toward the specific goal of understanding type. This allows for future exploration of the nuances of type with the MBTI® Step II™ Interpretive Report. And since my client would have already taken the Step II assessment, there wouldn't be a need for additional assessment taking—I would simply run the required report. The Step II Interpretive Report also creates the potential for multiple sessions. In addition to a basic session on the Step II facets, I provided sessions on topics such as type and stress, type and communication, type and decision making—all without needing to run an additional report. The *Introduction to Myers-Briggs® Type* library is a great resource for these advanced applications.

Coach

firob

- Behavior-based interpersonal needs—Inclusion, Control, Affection
- "Expressed" and "wanted" needs

strong

- Preferred work environments
- Work and non-work-related interests

tki

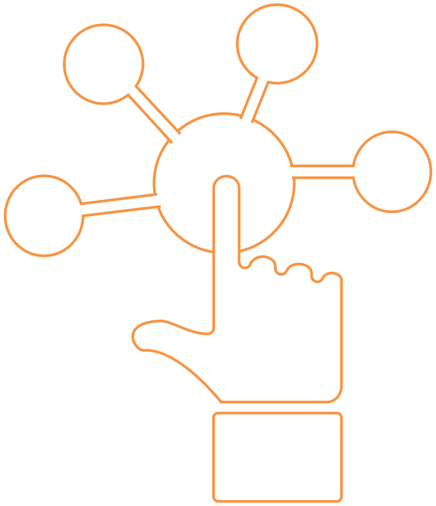
- Five conflict-handling styles: competing, collaborating, compromising, avoiding, and accommodating
- How and when to use each style

If you switch hats to focus on coaching, you can guide both individuals and groups though these advanced opportunities for type development. For individuals, self-knowledge of type helps in managing stress and improving decision making. For teams, an opportunity to explore the role of type in communication and to develop an action plan based on this exploration can be invaluable. A coaching approach encourages clients to discover for themselves the solutions to their challenges. Rather than tell them how to apply type to a situation, the coach partners with them to reflect on how their type preferences might shape their interactions and help them develop their own strategies. While a coach may offer suggestions with clients' permission, the main focus is on asking the questions that can shift their focus as well as their perspective.

Another opportunity lies in the option to use multiple assessments together. For example, the MBTI tool can easily be combined with the FIRO®, Strong, or TKI® instrument to explore specific areas. The behavior-based FIRO-B® assessment focuses on interpersonal relationships and social needs. The Strong provides an emphasis on work environments and both work and non-work-related interests, while the TKI tool concentrates on conflict styles. Each layering of multiple assessments brings with it opportunities to facilitate learning about the content of the assessment and for coaching clients through specific advanced applications. But remember, for each assessment you must follow the appropriate certification path to be allowed to purchase and administer the instrument and associated reports. So, take time to self-assess your consulting, coaching, and facilitation skills and obtain advanced training and certification as needed. If you're going to change hats, be sure that each one is distinct and appropriate, and that you know how to wear it well.

3 Starting your independent consultancy

For an independent consultant or coach, the tasks associated with starting a business can be daunting. While it's absolutely true that there's a lot to do, a few basic steps will help get you started in the right direction.



- **Determine what services you'll offer and who you'll offer them to**

  Who will you work with: individuals, groups, or working teams? Do you have the skills and qualifications to do facilitation and coaching, or will you only offer facilitated sessions and initial debriefs? Each assessment offers different options as shared throughout this ebook.

- **Establish a professional presence online**

  Once you're clear about the services you offer and who your target market is, it's time to establish a professional presence. Many potential clients like being able to do their research online and will explore your website to find out a bit more about who you are. Your first site doesn't need to be fancy—in fact, it might just be a single page—but it should clearly define who you are and what services you offer. Your web address could simply be your own name, or you may decide to have a company name. Part of a professional web presence often includes a LinkedIn profile, which includes your professional certifications, education, and experience. Be sure to include a professional photo on both your website and LinkedIn profile so that potential clients can begin to establish a connection with you.

- **Prepare to make additional contacts in person**

  While an online presence is important, you will also meet potential clients in person. Having an "elevator pitch" is critical. Being able to tell people quickly and clearly what it is you do and why they would want to work with you is an essential part of your marketing strategy. Business cards with basic information, including your website, will make it easy for potential clients to contact you. It doesn't have to include more than your name, telephone number, email address, and website, plus a tagline that sums up what you do.

- **Establish a professional network**

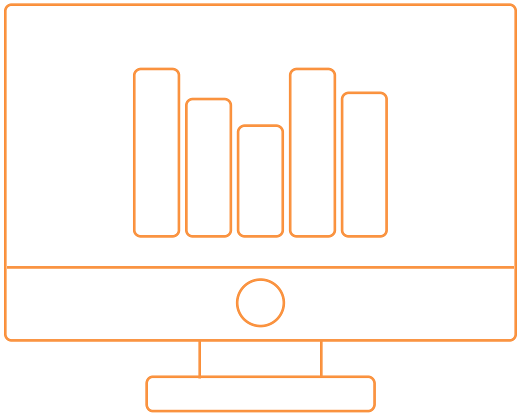
  It's important to develop a network of other professionals to brainstorm with and bring your challenges to. In addition, once they get to know you and your services, they can refer you to others with more confidence. For coaches, organizations such as the International Coach Federation have local chapters where you can connect with other professional coaches. Professional networking groups, such as Business Network International, can also provide connections and support.

- **Consider hiring a business coach**

  Having an objective partner who holds you accountable and encourages your professional growth can be invaluable to you as you establish your business.

4 Perspectives on pricing

As you go about determining the pricing for your services, following are a few key considerations that should drive your decision making.



Know your niche and its appropriate "price point"

Before you can determine what fees to charge, you first need to know who will be paying those fees to establish a price that works for both you and your client—each market has its own unique price point. For instance, a public school district will have a different budget than will a corporation; individual clients with a higher income will be able to pay more than clients with a lower income; different parts of the country have different costs of living and different price points. For example, the half-day MBTI debrief session that you charge a premium for when it is a corporate team development event might warrant only half the amount or less when it is provided for a public school staff. But remember, if you charge below the appropriate price point, clients will likely perceive you as inexperienced or incompetent; price above that point and clients will not be able to afford your services.

Don't "short-sell" yourself

The story goes that Picasso was working one day along the Seine when he was recognized by a passerby. The man excitedly approached the artist and asked him to draw a picture for him. Picasso obliged, made a quick sketch, and then told the man, "Here is your sketch; the fee is $1,000." "What?" the man exclaimed. "But it only took you two minutes to draw it!" "No," Picasso replied, "it took me a lifetime." Consider the qualifications and experience you have related to your services—your fees should be a reflection of your lifetime, or at least the span of your consulting career.

Develop a pricing structure that works for you

When I became a professional coach, it was recommended that I establish a set monthly pricing package for my services and to require all my clients to purchase a minimum of three months of coaching sessions. Although this works for many coaches, it didn't work for me. So, I built a pricing structure that was more flexible. I started with, "This is the value I place on the following services," and then flexed according to the needs of the client. Now, remember, your pricing structure may very well be different from mine—it may look much more like the pricing structure that was first recommended to me. What's important is to develop a pricing structure that works for you.

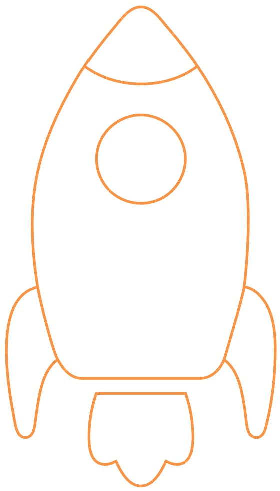
Build in pro bono services

While not technically a part of establishing pricing for your services, donating a portion of your services to deserving clients with limited income can actually make great business sense. While it isn't directly an income-generating practice, it is often part of a pricing strategy that reaps unforeseen benefits, and could provide a valuable example of your work when speaking to potential clients.

There is no one right pricing for your services—your qualifications and experience, geographic location, and the population you serve, as well as many other factors, will impact how much you charge your clients for the services you offer. Keeping in mind the considerations above can help you develop a pricing strategy that works for both you and those who benefit from the programs and sessions you provide.

5 Getting started

Every independent consultant knows the challenge of finding clients. While there's no definitive answer, here are a few strategies that can be helpful in setting yourself up for success in this area.



Determine your niche

This initial strategy will help you decide where to look for clients. Decide who you will provide services for, and be as specific as possible. While you can always offer services to others who ask, having a clearly defined niche provides credibility and focus.

- **Obtain your MBTI® Master Practitioner certification**

  This strategy is important on many levels. The process involves completing 40 hours of specific MBTI learning and 40 hours of using the instrument with actual clients. By doing so, you can: (1) increase your knowledge base and your confidence in using the instrument; (2) develop your niche as you choose the learning you want to pursue; (3) add the MBTI Master Practitioner designation to your list of credentials; and (4) gain access to the MBTI Master Practitioner referral network. For a nominal fee, you can be listed on the network's searchable database—it's an easy, cost-effective way to gain access to potential clients.

- **Seek out opportunities to share your expertise**

  As Winnie the Pooh said, "You can't always wait for people to find you; sometimes you have to go to their corner of the forest." Volunteer to facilitate a workshop at your local library, speak at a Lean In Circle or Meetup group. Determine where your potential clients are and figure out ways to connect with them. In addition to making a difference in your community, you'll often gain exposure to individuals in the audience who have other roles or connections and will now know how to find you when they need to hire a consultant, coach, or facilitator.

For independent consultants, finding clients is by nature a constant task. Taking the time to clarify your services and establish yourself as the professional to turn to will set you up for lasting success.

6 About the author
Marta Koonz, MA

In her role as a CPP Professional Services Solutions Consultant, Marta draws from nearly three decades of experience in working with teams and team leaders to provide team development training and individual and team leadership coaching services. She has worked in the education sector, with state and local governments, and for corporate and not-for-profit clients across a wide range of industries.

Marta is a credentialed MBTI® Master Practitioner and an MBTI® Certification Program Facilitator. She is an expert in training design and facilitation and is endorsed by Global Learning Partners as a Certified Dialogue Education Teacher. She is also certified by the International Coach Federation as a Professional Certified Coach and by the National Career Development Association as a Master Career Specialist. Marta serves as a volunteer with Stand Beside Them, an organization that provides free coaching services for returning veterans and their families.

Marta holds a master's degree in depth psychology from Pacifica Graduate Institute, with an emphasis in Jungian and archetypal studies. Marta has presented at the Jungian Society for Scholarly Studies annual conference, been published in the Depth Psychology Alliance online journal, and lectured on Jungian psychology and typology.

Certifications and Qualifications

- Myers-Briggs Type Indicator® (MBTI®) Step I™ and Step II™ Certification Program Facilitator
- MBTI® Step III™ Certified Practitioner
- MBTI® Master Practitioner
- Fundamental Interpersonal Relations Orientation™ (FIRO®) Certification Program Facilitator
- CPI 260® Certified Practitioner
- Strong Interest Inventory® Certified Practitioner
- Thomas-Kilmann Conflict Mode Instrument (TKI®) Practitioner
- Certified Dialogue Education Teacher (Global Learning Partners)
- Professional Certified Coach (International Coach Federation)
- Master Career Specialist (National Career Development Association)

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