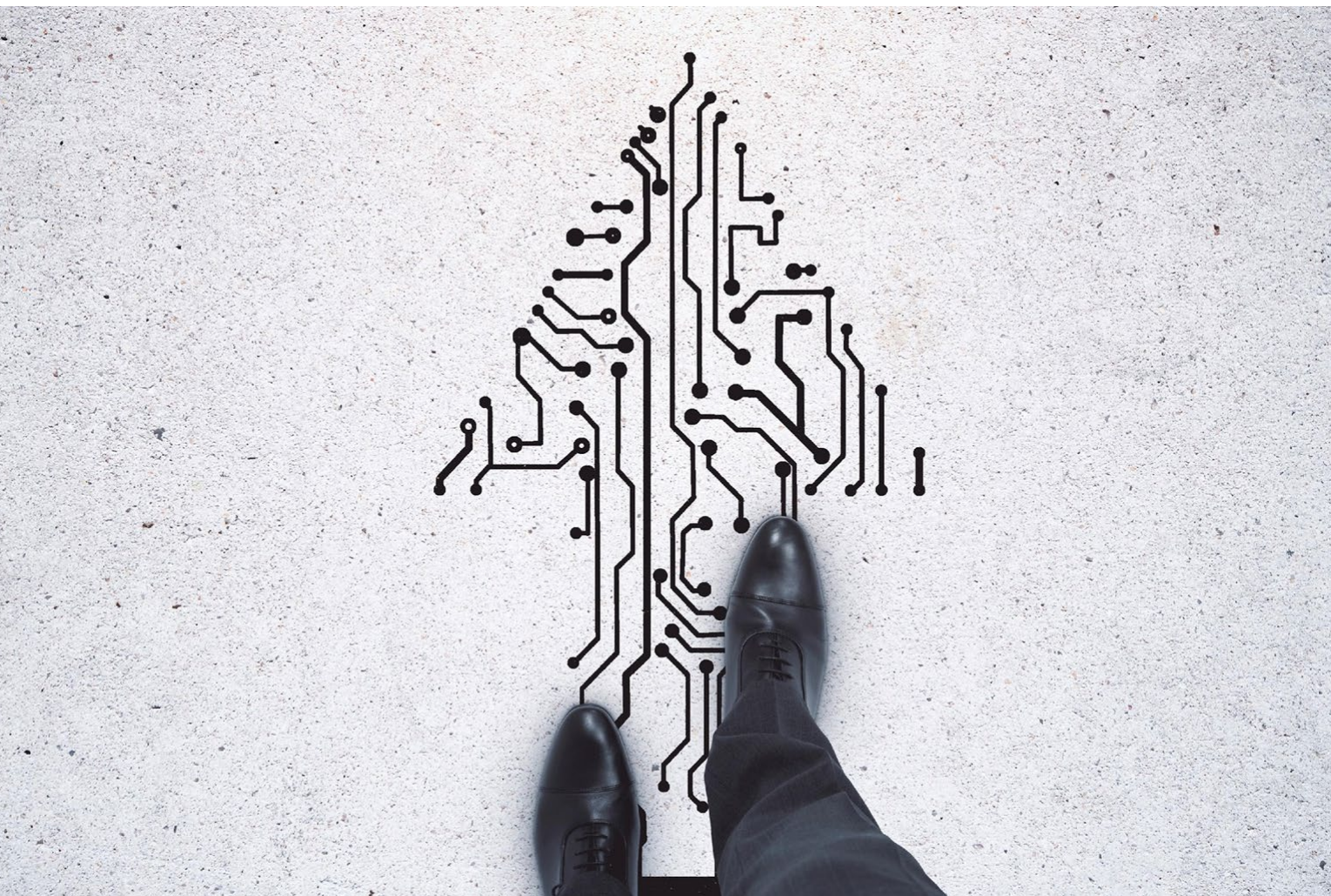


So You Want to be a Consultant?

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**OPPORTUNITY
MANAGEMENT**

Introduction



There has not been a better time to become a proposal consultant than right now.

Proposal consultants are needed regularly, especially in Government contracting. The demands of bid development force companies to routinely need additional resources. For example, the cyclical nature of Government solicitation releases means firms often require surge capabilities or need coverage due to staff burnout. In addition, mid-sized and small businesses often have limited or no proposal resources and require support during critical efforts. Another factor is tightening budgets and increased competitors in the Government space. Finally, the past decade, and especially the COVID pandemic, have increased the acceptance of the “gig economy” and remote options for work. When you combine all these factors, it is clear that the demand for quality consultants has never been higher.

Fortunately, there has never been an easier time to become a consultant. Various tax reforms, the Affordable Care Act and the resulting healthcare marketplaces, the competitive landscape of consulting firms, and the continued professionalization of proposal development has created an exciting opportunity for people to become their own boss while continuing in the profession they love.

However, there are a lot of things to consider as you begin your transition to consulting. This eBook provides guidance and tips on **some** of the potential needs, pitfalls, and opportunities for consulting.

Please bear in mind this is **NOT** a full guide and is not meant to convince anyone to enter consulting. However, it provides tips and advice for those already considering the option.



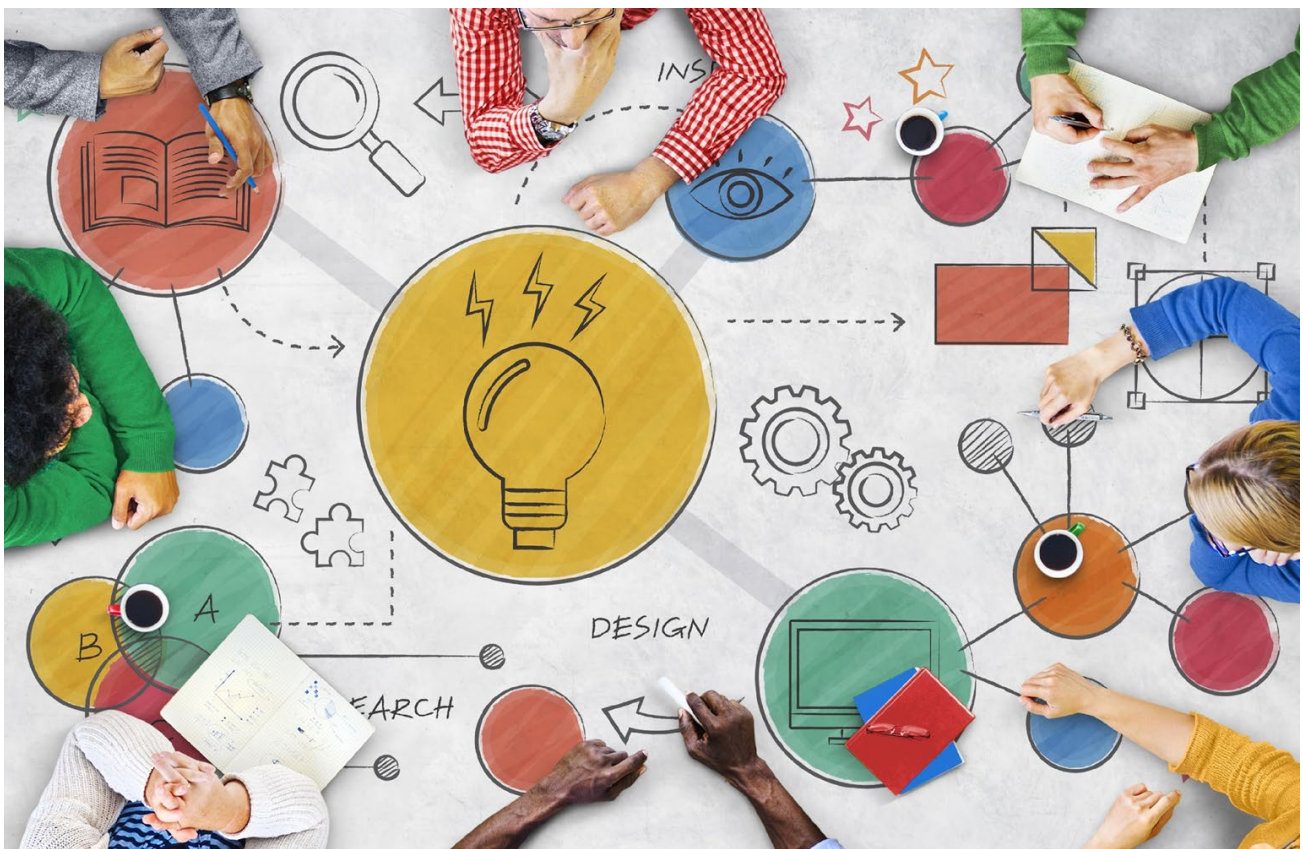
Start with a Plan



The first step to becoming a consultant is to develop a plan for going to market. There are a lot of factors that go into becoming a consultant and adequate preparation is critical to long-term success.

Therefore, I recommend you clearly define your vision and focus on establishing the basic structure you need. Below is a partial list of what you will need to hit the ground running.

- **Set Up an LLC.** Setting up a legal entity for your business-related finances and paperwork helps protect you personally and gives legitimacy to you as a business. There are numerous components to this, so I recommend consulting an attorney to make sure you address all legal needs.
- **Financial Planning.** Making sure you have a financial plan is critical to avoiding sleepless nights and achieving long-term success. Be sure you have adequate financial resources to get you through the lean times (which often includes the beginning of your consulting career).
- **Working with Consulting Firms.** Decide your plan of attack for working with established consulting firms. I recommend having your resume with at least two consulting firms in addition to marketing yourself. This increases your chances of getting projects to work on and, ultimately, your professional success.



Have the Right Tools



When you begin a consulting career, one of the biggest adjustments is that you are responsible for everything you need professionally. Therefore, you need to plan out the expense and time to get these tools and be familiar with using them. Some of the tools I recommend include:

- **IT Infrastructure.** In order to consult, you will need to make sure you have a reliable, stable infrastructure. First, make sure you have the fastest possible home network to help support you in our hybrid working environment. If at all possible, I recommend you connect directly to your router to ensure a steady connection and eliminate the potential signal issues with WiFi.
- **Computer Requirements.** A functioning laptop is a must. I also suggest you have an external mouse for comfort. For virtual meetings, I highly recommend both headphones and an external USB microphone. Finally, most proposal professionals benefit from having multiple monitors (in my home office, I actually have three). Also considering investing in a quality laptop travel bag for when you need to be onsite.
- **Software Needs.** You will need the Microsoft Office suite to be able to support your customers. In addition, identifying the expense and finance software you want to use (we use FreshBooks) and a way to track your time effectively will make your life easier and your business run more smoothly.
- **Office Set Up.** Finally, you want to make sure you are comfortable working from home. Even if you are on-site with a client the majority of the time, you will still have back-office work and more you need to do at home. If you have a dedicated workspace, make sure you have a comfortable chair and a good, spacious desk. If you are working in a shared space, I recommend you still do what you can to delineate it as your professional space and to ensure you are comfortable.





Who Are You?

It is imperative that, before you begin consulting, you know who you are and how you want to go to market. Earlier, I suggested you book your own clients and work with existing, established consulting agencies to maximize your chances to get work. You still need, however, to define yourself and your long-term goals. Here are some key questions to ask yourself.

- **What Do You Want to Do?** This question seems basic but it is also critical to your short-term and long-term success. What types of work do you excel at? There are a lot of options – proposal management, writing, editing, desktop publishing, etc. Be sure you ask yourself what you like to do as well – being happy with what you do is critical to success in consulting. Finally, just as important is determining what you do NOT want to do. Oftentimes, consultants take work that is not their favorite in order to pay the bills. Sometimes, they regret this decision. Be sure you know what you really do not want to do and keep yourself focused on what you prefer.
- **Who Do You Want to Work With?** There are a lot of consulting engagements out there. What types of client environments do you thrive in? Do you require a strong support structure to succeed? If so, you should look to work primarily or exclusively with large businesses, who can often provide that depth. If you work well on your own and are a “Swiss Army Knife” proposal professional, you would do well with small and mid-sized companies, where you often have to wear multiple hats.

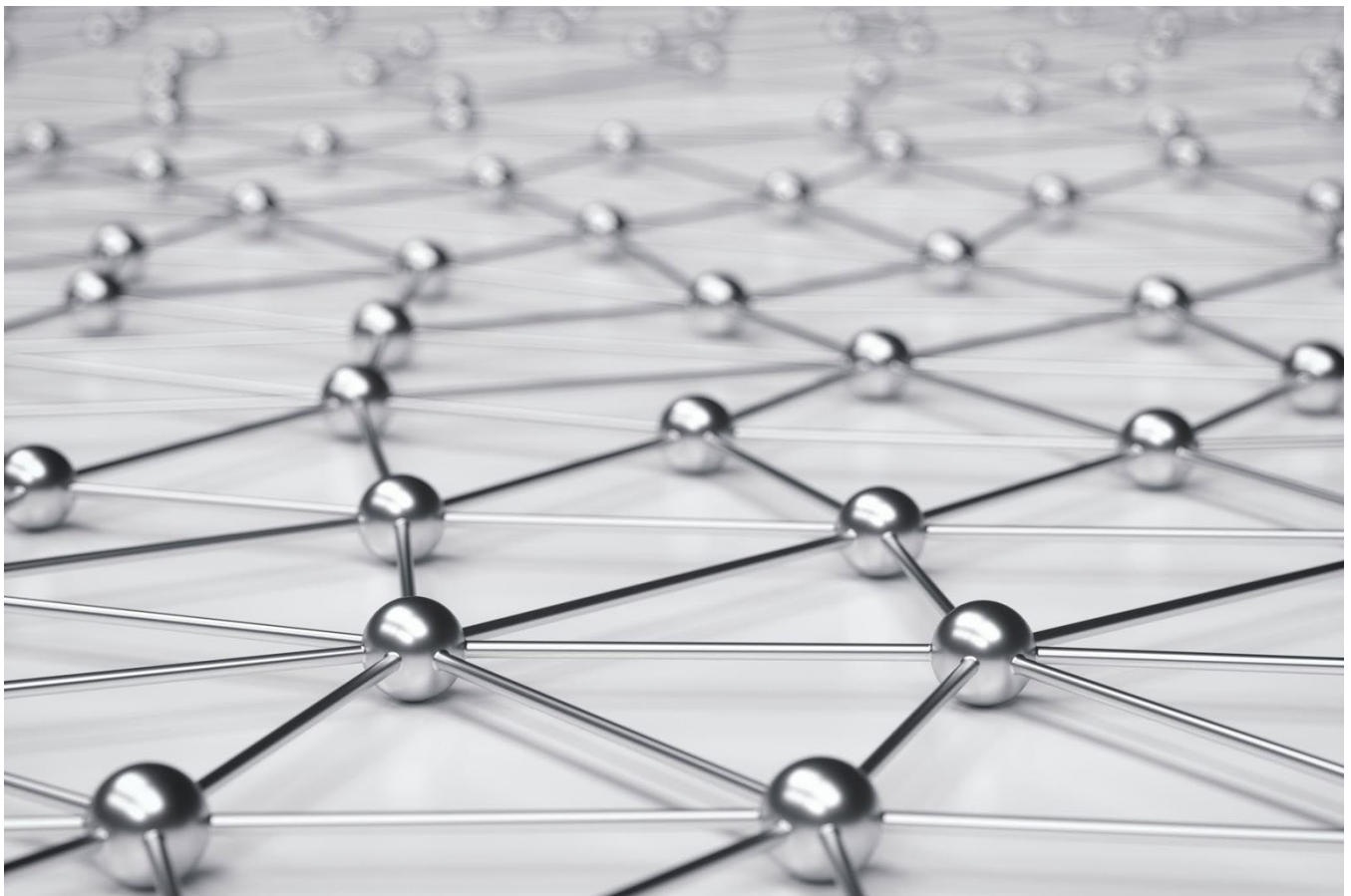


Get Yourself Out There!



Making connections with other proposal professionals and decision-makers in whatever market you are targeting gives you potential referrals and options. One of the most important things you can do is be active in the proposal industry and in the professional environment you are targeting. Networking is critical to your success. Here are some tips to increase your exposure.

- **Get involved in APMP and other professional associations.** One of the best ways to make connections is by attending professional functions and maintaining a presence in your relevant communities. If you are comfortable, take the opportunity to speak at events, which can build your reputation as an expert and a go-to person in your field of expertise.
- **Have a strong LinkedIn presence.** LinkedIn continues to be an important resource for businesspeople. Make sure your profile is up-to-date and highlights your areas of expertise and the roles you are seeking. In addition, be sure you remain active with your network. Post articles others will find interesting and engage in posts and discussions to keep your name out there.
- **Write blog posts.** Show your ability by regularly posting articles, whether in LinkedIn, Medium, and/or your own webpage. This allows you to make a strong impression with your potential clients and shows you as an expert in proposal development.



Keeping it Going (If You Want To)



“If you’re going through hell, keep going.”

-Winston Churchill



The most important thing in being a successful consultant is to continue pushing forward. There are going to be times when things get hard. A bid might be challenging. A client, or individuals on the bid team, might be difficult to work with. Payments may be late. There will be times where you are incredibly busy and other times where work is hard to come by.

You may be tempted to give up. That’s normal. It will cause you to reflect on whether this truly is the path for you. When those feelings come up, don’t ignore them. Engage in an honest conversation with yourself and your significant others. Is this lifestyle right for you and your family? If so, keep it going. If not, then there is no shame in leaving consulting and finding a full-time position.



Conclusion



Being a proposal consultant can be a rewarding professional experience. It provides individuals with the chance to develop their own path and flex their entrepreneurial muscles. It can provide an opportunity to have a better work-life balance and present new adventures and challenges with each client and engagement.

That said, it is not something to be entered into lightly. Making sure you are prepared for what awaits is critical to being successful. The tips outlined in this book are just a beginning as you explore potentially becoming a consultant. Be prepared to ask questions, seek out mentors, and do your own research to make sure you enter the realm of consulting with your eyes wide open.



Interested in learning more about consulting and potentially joining the BZ team? Reach out to us through our website (<https://www.bzopportunity.com>) or via email (info@bzopportunity.com).

