

## Episode 38: Top Consulting Lessons from 2019 and Resolutions for 2020—with Deb Zahn

I want to welcome you to Episode 38 of the Craft of Consulting Podcast. On this episode I want to share with you some of the key lessons from 2019 that I learned about my consulting business and some of what I know I have to do a little bit differently going forward. And then I also want to share with you very specific resolutions for my consulting business going into 2020. I want to share these with you because it might be helpful as you look back over what you did as a consultant this year. And as you look forward to what you want to do with your business in the coming year, hopefully I'll say some things that will spark some good ideas about what you can do. So let's start with the lessons.

The big thing for me that happened in 2019 was that I had worked for a national consulting firm for almost the entire time I was a consultant. There was a little bit at the beginning when I dipped my toe in the water of consulting, but I'd worked at a firm; I was employed, and I had a salary. And then in June I switched from being an employee to being an independent consultant and I went out on my own. Now I did have the advantage of already having a bunch of clients in the queue because they are clients I'd already worked with or cultivated while I was still employed and because I work now as a subcontractor with the firm that I worked with. So I still had business. So that wasn't really a problem for me, but there were a bunch of things I didn't really expect even though I did plan ahead. I put a lot of time into thinking about what it's going to be like. What am I going to do differently? What types of things do I need to have in place?

But the one thing that was a huge lesson for me was I that didn't expect all the variability and the delay in getting paid. When I was an employee, I was shielded from that. My firm wasn't. My firm certainly knew how long it took to get clients to pay or what some of that variability looks like. But I didn't. So I had a cushion. I had built up reserves over time because I knew that was important, and I knew there was going to be some variability. But I needed a bigger cushion. So I had about four months saved up where I didn't have to worry about it. I had the money to pay bills. Everything was fine. But, in reality, I probably needed closer to six months and maybe up to eight and maybe even longer.

And that's because some clients just pay on a very different schedule—regardless of what you have in the contract. Sometimes it would take six months to get paid for work I had already done. So that was a big lesson for me. I wanted to share it because if you're thinking about becoming an independent consultant, I would definitely encourage you to have a bigger cushion than what you think you need. Because you never know what the actual payment is going to look like. It's not just about getting business; it's also about getting paid for what you do.

So the other thing that was a big lesson for me, and I did a lot of this at the beginning when I said, "This isn't just about having a business, this is about having a life. So what is it that I want to do with my life?" At the beginning I had a really good plan and I stuck with a lot of it. I did work to figure out what my priorities and boundaries were. The piece I didn't do, and this was a big lesson, was that I hadn't really planned for what I would have to do to be able to defend those things. I didn't really plan for my weaknesses. So I had a great plan, but I didn't say, "OK, I know that when I get really busy it's easy for me to just sort of get rid of all the other things in my life that are meaningful to me. And usually, as I've said in other episodes, it's my health that will take a hit. I don't eat as well. I don't exercise as much. I don't sleep as much. And once my baseline depletes, it's harder for me to do quality work."

So even though I had made a plan for my life, and I included in that plan those things that were important to keeping my baseline in good shape. But I hadn't planned for, "Hey, what happens if some unexpected things pop up that make that harder?" And I know because I've been doing this a long time. Unexpected things always pop up. So going into this new year, I know I need to plan for those things I'm going to do when it gets harder to have balance in my life, when it gets harder to match my life plan. And that was a big lesson for me.

The other big lesson was that... I'm a systems person so I definitely knew that systems were really critical, especially during my transition and especially when I launched this business. So that's two parallel systems I had to have in place to be able to make those things work—having balance in my life while launching a new business. So what I learned is that productivity is really my friend. And it's funny, I used to look at all the things people talk about in terms of how to be more productive. And I thought, "Well, that just seems like a burden. It seems like an extra set of things I now have to do. These are changes I don't really want to make. Well, I've learned that they're actually there to support and make my life easier. And so the biggest lesson I learned is if I want to spend less time fussing with things and doing things that take a bunch of time, but that are kind of repetitive because they happen all the time—like invoices, timekeeping, the financial system—I should automate as much of that as possible.

So the example I'll use is the really good software system I use for timekeeping and invoices. It has automated features to make it easier to do over time. But I hadn't set all those up at the beginning. So I ended up, when I got busy, just doing it all manually. I kept doing it all manually over and over again. And I know I would have had more time for myself and more time to do the things that were in my life plan. If I had just stopped at the beginning, or even before I made the transition, and anticipated what some of that repetitive work was going to be and automated it at the beginning so that I know what my budget categories are. So I know exactly the clients I currently have and how I'm going to track them.

And there are other things I could have done at the beginning—like knowing who I'm sending invoices to and putting that information in ahead of time—so I can save time throughout the year. And it might just be 5 minutes here, 10 minutes here, but, over the course of a year, that adds up to hours and hours that I could have used to do other things. So that was a huge, huge, huge lesson for me.

The other thing I learned that was really important is that delegation is a beautiful, beautiful thing. I was very fortunate that further into the year I hired a virtual assistant. That was probably the best thing I did all year. Having a virtual assistant is like having an executive assistant, but it's all done virtually. It works really well, and I've got to give a shout out. Danielle McGinnis from Clerical Edge, LLC is my virtual assistant and she's absolutely fantastic. I use her for all sorts of things I used to do myself. Now I'm able to pay someone who's highly skilled at doing things that maybe I'm OK at, and that frees me up to do the things only I can do. So that was one of the best things I've ever done. I wish I had done it sooner. My key lesson is I wish I had hired her much sooner because it would've made my life easier.

I also learned that if I'm going to delegate—and I know the value and the power of delegating and what it can do to help me free up my time—I can really devote it to my clients and growing my business. I have to be really careful when I'm hiring folks. And I have to be really careful when I'm putting people on my consulting teams. I've worked with some absolutely fantastic people, but not every choice has been the right choice. Something I heard on another podcast—and I wish I could say who it was so I could give

them credit, but I don't actually remember—somebody said when you're thinking of hiring someone or putting people on your team—if it's not a hell yes, then it's a hell no.

And there's really not a lot of room in between. I have definitely made some choices where I thought, "Well, it's close enough." And then the problem is, when you get into that situation, you start working with someone that's close enough. The ways that it isn't close enough will end up being work you do, and it will end up being a burden for you. So I would say my big lesson is this: If I'm not sure it's really a fit, I either need to say absolutely no, or, if I'm in a situation where I can't say no, then I need to hold back my expectations and be realistic about what this person can and can't bring to the table relative to what the actual need is. And then I need to plan my time and energy accordingly because I know I'm probably going to have to spend more time and do more than I expected. And I need to plan for that so it doesn't become this extra thing I'm suddenly burdened with that I didn't plan for. So now that's going to come out of my exercise time, my healthy eating time, my family time, etc.

So those were my really big key lessons. I've heard these exact ones from other consultants so I know it resonates with a lot of folks. But I also want to talk about my New Year's resolutions. As with any type of resolution, the key is don't try and take on too much. You don't want to have a gazillion different resolutions that are going to feel overwhelming. And if you don't do all of them, you feel like a failure and you never end up doing them.

You want to pick resolutions that are really meaningful and doable so you can create plans to actually do them. I like to do my resolutions in business and in life by picking a big decision criterion or operating principle. Then the changes I want to make fall under that. The example I give is when my husband and I got married we had an operating principle of *maximum joy, minimal stress*. And we ran all our decisions past that operating principle, which is how we started with a guest list of 120 people and fancy this and fancy that and we ended up with four people in our backyard in New Jersey. Now that doesn't that sound like a dream wedding to everybody, but we loved it. We thought it was fantastic. But we kept running everything past that principle.

So when I sat down and I thought, "OK, given the lessons I learned this year and the things I think I could do to make positive changes, what would be that operating principle this year?" And what popped in my head was the phrase *serve better, easier*. And I think that really needs to be a T-shirt. I want to serve my clients better than I'm serving them today, but I also want to serve them in a way that it's going to be easier for me to do it.

So if I run everything past the operating principle of *serve better, easier*, that's going to help me make choices that not only make whatever I'm doing for clients the utmost quality it possibly can be, but it's also going to make my life better.

Here are the resolutions I'm going to work on:

*Streamlining systems to balance time and effort.* The first is to really focus on what balances my time and effort better. So that means looking at—and I'm actually going to do this in the first part of the year because I think it will free up time to do other things—ways I can streamline my systems, like automating things that can be automated so I can reduce my workload.

*Using email as a tool for me not being a tool for email.* One of the main things I know I can do—and it's set up and ready for me to do it, I just need to start getting in the habit of doing it—is to get better at using email as a tool for me rather than what it feels like, which is that I'm a tool for email. So I already turned off my alerts because those were distracting. But I want to schedule the time when I'm going to do my email during the course of the day. I did that at the beginning of the year, and it went great, and then I fell off the wagon and started slipping back into doing email throughout the day and getting totally distracted. But I want to review it and the things I have to follow up on, then I'll move those emails directly into my calendar so have a very specific time I'm doing it. I've been doing that for the last month and it has been tremendously helpful. So for 2020 that's the big thing I want to do and benefit from what that lets me do.

*Using my calendar as the source of all truth.* I heard this on another podcast, and I wish I could credit somebody with it. I find to-do lists stressful because they tend to be really long. The only thing I ever enjoyed about them was writing things down and then crossing them off. That was tremendously satisfying. But I want a calendar with everything I'm doing so that I know it's reasonable that I can get things done in a day. And I can learn over time because if I calendar too many things and I never get anything done I need to adjust how I'm doing it. That's something I want to work on at the beginning of the year.

*Elevating my client experience.* In 2020 I want to elevate my clients' experience, the experience they have with me as a consultant. This goes back to the last podcast I did with [Shaunice Hawkins \(Episode 36\)](#) where we talked about how important it is to reassess your brand every year and look at it relative to what your actual reputation is in the market and make sure those are aligned. If they aren't, you've got to do something to fix that. One of the things I know, because I've already started that process, is that I have what she referred to as some operational gaps. So I don't respond to clients as quickly as I want to and as quickly as I want them to experience from me.

*Taking on less work.* Elevating my clients' experience will also help me respond in the manner I want to when I'm working with a client or when I'm potentially going to work with a client. So this is the big resolution for 2020: I'm going to take on less work. Now if you're brand new to consulting, you're probably hearing that and saying, "Wait, what? Don't I need to get as much business as I can?" Well, at the beginning when you're building your business, that's a reasonable thing to think and to say, "Yeah, I need to get a bunch of business in the door." But once you've established yourself, then you really can and should pick and choose. Now I do think you should be discerning at the beginning because you don't want to take on work you can't do very well and hurt your reputation in the market. But now that I'm very well established, I can say yes or no to things. I get more requests than I could possibly do, and I need to be able to say no more, even if it's really interesting, juicy work that I totally want to do. And that's the hard thing when I hear something, I'm like, "Ah! That sounds fun. Plus I'd be really good at that."

I have to start saying no to things like that too because I'm fortunate that I have a lot of really great people come to me with really interesting work. So there will be other opportunities. And I've generally had a rule that if I get too busy, I don't say no to repeat clients. So if they've worked with me in the past, I always want to make sure they get what they need. I generally will not say no to them. Probably as I'm heading into 2020, I'm going to have to either say no or say, "I would love to do that, but I can't do it now" or "I can't do it, but I've got somebody who would be great." Because that really, at this stage, is

the only way I'm going to be less busy and be able to always deliver quality. I also want to make sure that any time that I free up—this goes back to my life plan—I'm going to use that to raise my baseline so I can always bring my best self to my clients. So that's exercising, meditating, eating, and preparing my vegetables so that I'm not eating as much processed crap. And that's going to help me be a better consultant.

And then just a few other things. And again, I said don't try and do too much. I don't plan on doing these all at once, but all of them fall under the *serve better, easier* principle that I'm going to run with this year.

*Delegating more.* So one is I'm going to delegate more. That's also going to free up some of my time. So when I'm on teams, the most important thing I need to do is take the time at the beginning to onboard them so that I actually can delegate. Because anytime I've skipped that, and I've actually skipped a whole bunch, what happens is, once I get busy and I don't have time to explain everything, I will say things like, "You know what, it's just faster if I do it." Well, the problem is that I'm going to say that over and over again. In which case I'm going to be too busy, and they could do a perfectly wonderful job at it. If, at the very beginning, I had taken the time to actually onboard them to make sure they had the information and tools they needed to be able to accept delegation from me. So that's going to be a very big one.

*Check in with the joy behind why I'm a consultant.* This last thing is related to everything, but it's the fuel behind what will actually get me to *serve better, easier*. It's that I want to take time throughout the year to check in with the joy behind *why* I'm a consultant. So my big *why* is that I love helping people. I love helping them do things they've always wanted to do or they've dreamed of doing and they just needed help to do it. I am driven by a desire to help people accomplish their goals, and that's my joy in doing it. And I feel like a lot of times, I get so busy that sometimes I forget that. So I want to very deliberately, throughout the year, schedule time—because remember, my schedule, my calendar will be the source of all truth—to just check in and pay attention to the things I've been able to help people accomplish and the joy I've experienced in doing that. Because again, that's going to be my fuel that's going to keep me going and keep me focused on being the best consultant I can be, which means I actually need to practice and do all of these things.

So those are my New Year's resolutions and I will probably, in a blog or on a podcast, check-in throughout the year and tell you how I'm doing with those. Because another really helpful thing if you're trying to change behavior is to have actual check-in points and accountability with other people so that you know that you're going to stay on track.

I hope that was helpful. I want to thank everybody tremendously and from the bottom of my heart for listening to this podcast. I started podcasts on April 29, 2019 and my listenership and downloads have been increasing and, especially the last few months, started to double and go up even faster. I love that there are people all over the world who are listening to this. I hope that I'm being helpful and that I'm serving you. So the other thing I would ask is that if you want me to cover any particular topic, if there's something you really want to hear about or you want me to go find an expert who can get on and talk about how to do something, please let me know. You can send me information through my website. You can send me an email. I want to hear it because I definitely want to serve you better as well. So thank you so much, and I will talk with you in the new year. Bye-bye.

