

Episode 113: Overcoming Isolation as an Independent Consultant—with Laura Marella and Jeanene Kroetch

Deb Zahn: Hi, I want to welcome you to this week's episode of the Craft of Consulting Podcast. So we're going to hit two really important topics on this podcast. The first is, how do you deal with and address the isolation that often comes with being an independent consultant. What can you actually do about it? And then the second thing, is to talk about how to think about how you offer your services, not just as selling yourself doing projects but also creating products. And having products that can be a tremendous benefit to you, your business, and your life, but also to your clients.

So I brought on Laura Marella and Jeanene Kroetch, and they are from Overflow, which is where independent consultants who work in marketing innovations, communication design come together and get resources and support that they need to be able to accelerate their business. And we talk about those two things. Fabulous stuff. Let's get started.

Hi, I want to welcome to my show today two fabulous guests, Laura Marella and Jeanene Kroetch. Welcome to the show.

Laura Marella: Thank you so much for having us.

Deb Zahn: So let's start off. Tell folks what you do.

Laura Marella: So Jeanene, Rocio Fernandez, and I are the founders of Overflow. And Overflow is a platform-based accelerator that serves independent strategic consultants in the areas of marketing, innovation, design, and communications.

Deb Zahn: Wonderful. And so for that platform, which has, I believe by the time this airs, it will have launched. And I know you do three things. Let's start off. What are those three things that folks can come to Overflow for?

Jeanene Kroetch: There are a lot of things you can come to Overflow for, but primarily we defined the three pain points for consultants, and we developed Overflow around that. And the first one being the sense of aloneness that you have as an independent consultant. So we wanted to create a community where people feel supported and can bounce ideas off others. Also, can find collaborators to help them on projects, which, if you've gone from a corporate environment to independence, that's one of the things that you miss the most is the resources that you didn't realize were so valuable that were at your fingertips.

One of the other things is the ability to provide leads for people into work and projects. And for that, we have invited clients on our platform. We also have a product on our platform called Market, which is how we aid consultants in going from a project mentality to a product mentality. In creating their work that they used to see as a big collaborative effort with many, many people, down to a product that they can actually deliver to a client.

Deb Zahn: That's wonderful. And we're going to get into all of those things in the interview. Let's start off with the isolation one. So I used to be at a firm. I went from the corporate world to a firm and to independent consulting. So I'm fortunate that I still have colleagues who I get to work with. But I see the

isolation happen across multiple dimensions, as people first start off, and as they try and build. What are you seeing that lets you know that, "Oh yeah, this is a big pain point for people." What does that often look like for consultants?

Jeanene Kroetch: Well, I can speak to that on a personal level because when I started out on my own, I wasn't really prepared for that. It came to me as a shock actually because I was in a unique environment. I'd been working all around the world, so I had kind of a global community. And the last five years I had been working in New York, and I had been working at an agency where I had an inward-facing role, as opposed to an outward-facing role. I hadn't really networked into the marketing and advertising world in New York.

And then I was striking out on my own, and I didn't realize how difficult it would be to establish those connections and those contacts and start turning them into real work. It took me over a year to be able to do that because I was doing so much on my own because through my own fault, I hadn't established this network that was necessary to come forth. And there wasn't a product like Overflow that I could reach out to, to help me do that in a quick way. So it took me a whole year.

Deb Zahn: Which isn't unusual from what I've seen. And that's certainly important, from getting the business part because I give this advice, other people give the advice that your first best source of leads and prospects is going to be among your existing network. So if you're on your own, that can be a little more difficult to tap into that. But I also noticed there's other dimensions to it, in terms of you had all this support around you, you had other people you work with, and then boom, now it's you. A cup of coffee in your pajamas. So talk a little bit about what you've seen that some folks experience as suddenly they become the CEO of everything.

Laura Marella: Yeah. I'll just add a little bit to what Jeanene was saying. Yes, that's CEO of everything. You forgot to add in the company and collaboration of your pets. They're always...

Jeanene Kroetch: That's right. That's right.

Laura Marella: Yes. Yes. I think that it's the CEO of everything also makes you keenly aware of the fact that you don't have other resources that you had access to before. Yes, it's the collaborators. But in my case, it was less about the networking for new business, it was more about having a bench of people to actually do the work and you feel comfortable in the CEO role of doing the work, but when you're the CEO and you have basically a company that doesn't have access to research, that was my big pain point.

Like at an agency, we have hundreds of thousands of dollars of research available to us to do strategic work and lead their business. But I was suddenly independent and OK. Yes, I had a good network as I was working in that capacity, that was my role. But I didn't have the ability to even harness all that great network with the backup of the research. And that's what Overflow does as well as we provide insight-based tools to the strategists so that people like myself, when I left, have that confidence when they...when they make the leap that they're not leaving and just having to be the CEO of nothing other than their relationships if they have the resources to do the work. That they can afford them. We make them accessible at prices that an independent consultant can afford.

Deb Zahn: And explain a little bit for those that aren't as familiar with it. Because they're like, "Research? I never had research. That would be great." What type of research do you use in consulting that helps you serve your client?

Jeanene Kroetch: Well, one of the things that I do is I do a lot of global training. I'm always looking for examples of marketing cases and results-based advertising or communication programs that have really good track records and we can learn from that. There are a lot of resources available on the internet, but a lot of it is not curated for you. We spend a lot of time just in the land of Google, trying to find what you really need. And there are resources out there that have curated and cataloged and pulled the insights for you and given you great examples. And those are the kinds of resources that I took for granted when I had them at my fingertips. I truly did. And it wasn't until I was spending hours slogging through Google, trying to get all this information myself, that I really realized how valuable some of those resources are.

And it's not only just the research, but it's people that can help you analyze the research and can help you draw insights from it or float ideas about what should be put in front of a consumer because it's a valuable proposition, but it needs to be refined or explored or examined just a little bit more. So it's also having that group of people that you can bounce, those ideas and insights and all of the things you get from research...

Laura Marella: Oh yeah.

Jeanene Kroetch: ...available to you as well. And that even goes to the two people like collaborators that you would work with. Creatives, project managers, those kinds of people who, who are providing input to the whole process that you're going through.

Deb Zahn: That's right. I recall when I transitioned into being independent. I'm still a practicing consultant. I'm in the healthcare space in the U.S. And I had all these amazing experts who had done all this analysis at my fingertips. At any time, if I had a question about some bizarre esoteric rule that you must follow to do X, Y, and Z, I had someone I could ask. And then when I become independent, it's either you're in Google rabbit holes and they may or may not be true, so you can verify that what you're finding is accurate. Or I got to figure out a way to bring someone in who knows it, who then also has to get paid and we have to work that out and it becomes much more complex,

Laura Marella: Right. For people like me, I counted a lot on the research. I was very research oriented in my own personal orientation and I felt like that was something that actually prevented me from becoming independent sooner because I knew it was going to be a problem for me. I didn't want to be spending the time. And at that time, it wasn't as easy to look things up on the internet. But having to ask favors from people, trying to get the information from a work around in some other way, and it cannot just inhibit you when you become a consultant, I think sometimes it prevents people from becoming them.

Deb Zahn: Yeah. Or even imagining not having the folks that you could collaborate with. And now, wait a minute, so I'm not only going to do the work that only I can do, but I'm going to be the project manager? I'm going to be the person who does all that too, which isn't even necessarily cost efficient for the client, but what are you going to do?

So I know there's also an emotional toll and I know Overflow is also not like a therapy site, but one of the other things that happens when folks go independent and they're used to the comradery of being in an environment with other people and what have you seen, or you experienced yourself in terms of what you have to also deal with emotionally when you make that switch?

Jeanene Kroetch: I think that is one of the hidden elements that people don't think about when they think about the lure of being independent. Because for me personally, it was much lonelier than I anticipated. I didn't realize how much I gained, even though I was really like a desk jockey at work, I was one of those people who, when I worked in a corporate environment, I was pretty much at my desk head down, except when I had meetings, working. I didn't realize how much I gained from an occasional walk around the office and the serendipitous encounters that you would have with people who were working on cool projects. And you just kind of wanted to stick your head in and see how things were going.

And I found it very, very difficult actually to prevent myself. I think from being on the borderline of being depressed.

Deb Zahn: Yeah.

Jeanene Kroetch: Just I was alone so much of the time and not interacting with people, except when I forced myself to go out and grab a coffee in the middle of the morning just to go outside of my apartment. And that was exacerbated extremely, I think, by the pandemic recently.

Deb Zahn: Oh yeah.

Jeanene Kroetch: And so we've had a lot of people talking to us about that. How they're very excited for an opportunity to be able to share and collaborate and just to get together, even if it's in virtual spaces with someone who might be sharing the same kind of experience they are. Granted, you're right. It's not therapy, but it's a kind of positive aspect that I don't think that we had anticipated when we were starting thinking about Overflow because we started in February of...

Laura Marella: It's been a year.

Jeanene Kroetch: Yeah, it's been a year. And it was just like, well, whoa. We came at the right time. I think for people to actually see the value in what it was we were trying to do.

Deb Zahn: That's right. And now everyone knows what it's like to be an independent consultant.

Jeanene Kroetch: Exactly.

Deb Zahn: Stuck at home during the pandemic. Yeah. My husband, when I started to go a little stir crazy, he's like, "You know it's bad when the introverts want human interaction. That's a warning sign right there." So how do you deal with that? Thinking on a personal level or what you've talked to other folks about, how do you get past some of that isolation?

Laura Marella: Well, I forced myself to have interactions. It's been really a lifesaver for me to actually be launching Overflow over the course of the pandemic because that was pretty much daily conversations

with my peers, which I wouldn't have had in another kind of scenario. And I was really fortunate that one of the clients I was working with, we converted training that had been planned for live to virtual. So that kept me busy for the other half of the time that I wasn't working on Overflow. And that was interesting too because there were challenges that I was facing that I'm now seeing that other people are facing as they try to go independent, where more and more work has become virtual and how to get that work from a live situation, converted into a virtual experience that is valuable both for the person who's doing it and the people who are receiving it.

Deb Zahn: Yeah. And I think that's a great example because I know most folks have had to figure out how to solve that problem and thought they had to solve it on their own. And I was fortunate because of my podcast that I knew someone in Australia who knows the art and science of how to do this and independent consultant, Leanne Hughes, I'll give her a shout out. And so I had someone I could turn to, to say, "I want to hire you to figure out how we're going to do this with a client because they're used to 50 people in a room and now everybody's on the zoom. How are we going to make this work?" But I think that comradery is so, so, so important. The thing I'd ask is when you think about the isolation that folks feel at the beginning or the resources that they suddenly don't have access to, what would you tell a new and independent consultant to never do? Just whatever you do, don't do this thing.

Laura Marella: Don't try to do it on your own.

Jeanene Kroetch: And don't think you shouldn't ask for help.

Deb Zahn: Yeah.

Laura Marella: That's what I need. Right.

Jeanene Kroetch: Because, for me, I was someone who was always tremendously independent. It's always been really difficult for me to ask for help. I've always been the person giving the help. And so for me, that was probably one of the most difficult things because striking out is independent just by the name, it's like, "OK, I'm independent." But that doesn't mean that you don't need other people to help you. So I would say take all the help that you can get. Don't be afraid to take the help and don't be afraid to ask for it.

Deb Zahn: That's right. You're not a homesteader out in the wilderness. There are people around. Laura, would you add anything to that?

Laura Marella: Yeah. I think that's exactly right. Just because you want to be independent doesn't mean you want to be alone. And, and I think that's exactly the premise of Overflow and that you have access to other people. Like if you join communities like Overflow...it doesn't have to be Overflow. It can be in your area of specialty, but you join those and you do have that access to the other membership, you do have access to resources and people that you start building this whole other support system that replaces that infrastructure that maybe you chafed at the time. It was very challenging, but you create the community that you like, the people that you like working with, the people that have similar values to you and that approach the work with the same orientation.

Maybe not the same thinking because you want diversity of thought, but at least that same kind of empathy you created in a corporate environment, you can create that in your own community of collaborators. A lot of times they're there and available to you, you just have to access them.

Deb Zahn: I love that building the community of choice because I know in a lot of work environments, if you have to do sort of group task, it can often feel like a graduate school project, or grade school even, I don't know. That it's forced. And you're not necessarily with someone who's going to approach it in the same level of quality or timeliness or anything that you would. But when you get to pick, you get to have a dream team where you can, you know, flex it up and down, depending on what you need. I think that's a beautiful, beautiful thing to be able to do.

Laura Marella: Yeah, the power of choice.

Deb Zahn: So one of the other things I want to hit on because it's one of my passions is for consultants, not just to think of themselves as the only thing they sell and to start thinking about products. And at the firm where I was, I was one of a few people that developed the first ever product that they offered. And we did it because of a particular need and demand within the market and to be able to offer it at scale. And if it was just us going out, it wouldn't have been affordable and it couldn't have been at scale. So we had enormous success with this, so I'm a convert 100%. But describe to folks who, what do you mean by a product? For someone who's scratching their head going, "What, I don't just show up and get paid? What do you mean by product?" What would that look like?

Jeanene Kroetch: Well, one of the things that independent consultants are facing is that when they come from that corporate environment, they work on projects, right? So the challenge is how do you change a project mentality to a product mentality. And in doing so, there are basically three things you have to look at. One is you have to make sure that what you're solving for is a valuable problem. That people have paid for it, maybe they've paid for it multiple times, and they recognize it as a problem.

And that you know who the clients are for the product that you want to be putting out there, you know where they work, what department, what area of responsibility, what kind of company. And the third thing is that the solution that you design is repeatable. And sometimes, particularly with strategic products, that means that you're doing a lot of the design work around a process or around a system because it's still going to require some of your interaction and your independent thought and your consideration for who the clients are. But there's a lot of putting that structure in place so that it can be a repeatable product, if you will, in a much simpler way.

Deb Zahn: And what does that let you do? So for the consultants who still need to be convinced, why would you even consider doing a product?

Jeanene Kroetch: Well, if you can consider doing a product, you actually have the potential for a far larger revenue stream. And you spend your time doing the things that you like to do, which is brainstorming with other people who are great thinkers about solutions to problems. You don't have to focus so much on the structure and the system for getting there.

So for me, I think it is a little bit of work putting that thought and that effort into designing the structure, but once you get that in place, then you get to spend your time playing around with the fun part of your work.

Deb Zahn: Exactly.

Jeanene Kroetch: And then you can multiply the positive effect of that by reaching more people and working on more projects with people and having just a larger range of potential clients than you may have had when you were doing everything all by yourself on an ad hoc basis, one at a time.

Deb Zahn: Right, it also frees you up from hourly billing, which...

Laura Marella: Right. That's what we've said. Yeah. It frees you up because when you're just in hourly billing, there's a limit to how much you can make. You have to just keep working more hours to make more money and that's ridiculous. This provides a consistent revenue stream. It's a lot of time after you get it up and running, it's a relatively passive revenue stream in some cases. It can be great for generating new clients because you can provide them with content or products that are kind of bite-sized samples of your work. So that can grow, be an assistance to your marketing efforts as well. So yeah, and it can be quite scalable. I mean, it's probably not going to take over your entire revenue, it's probably not what you're going to do entirely, but it's a terrific way to bolster your project-based work.

Deb Zahn: I would add one thing to that. I love all of that, as it also enables you to respond to urgency at scale. If there's a major shift in the market or something happening, and there's suddenly a demand that everybody or darn near everybody has, it's a way to meet that demand without having to spread yourself so thin that it would be impossible to do it.

And I'll give a quick example just because again, I think I want folks to wrap their head around being able to do this and then we'll talk about the how. So ours was a simple assessment tool. There was a major shift happening in the market. It was going to impact how people were getting paid. No one knew how to get ready for it because no one knew what readiness meant. And so we did an assessment tool, which was an online automated tool that would assess their readiness. So it actually taught them about readiness while it was assessing them. And we heard things from CEOs of, "This is the first time I knew what conversation to have with my senior leaders after encountering this topic." And so there was an urgency in the market. There was a significant demand for it. It didn't replace the other work we did, but it certainly gave an entry point to it. And it was quite lucrative. So that's great.

OK, so now we've convinced everybody. Product is a great idea. And they're going to think through those three things because I love the fact that no, no, no, don't just do a product. We want you to actually think about it, to make sure that that someone's going to pay for it and it's going to actually help them. So how would they go about saying, "OK, let me create a product."

Jeanene Kroetch: That's like the million-dollar question. I think that there's more than one way to go about creating your product depending on what it is you want to offer as your service because it could be something as straightforward as creating videos that are online training around a specific subject. And that would be to the extreme of one end, which is completely passive. Once you've gotten it done, it's out there and all you have to do is promote it, which is fantastic. And to the other end, which is defining a service that you would like to provide that does require customization because it's a kind of sticky problem that requires individual information from the brand that you are working with. So in that case, it would be more like what I had spoken about earlier, which is having a consistent structure and design in place for being able to implement that kind of project with a client.

So it really depends on what the product is that you've decided you want to go forth with. And you can probably find a way to sell that product, if you will, anywhere along the spectrum.

Deb Zahn: Right.

Jeanene Kroetch: It just depends on how comfortable you are with having it be the, "All right, here it is. All set. I'll just have people press a button and they can buy my little video or my white paper or whatever content it is that I have created that is immediately consumable," all the way to something that is a more customizable experience, but it's around a framework that's already been established to be more efficient for you.

Deb Zahn: Love it. So there's a lot of room to maneuver and decide within the framework that you're suggesting, which would suggest that there's likely a product in there for most people. There's some type of product most folks could do. If you start to look at what's their demand for, and what's repeatable, you could probably find something.

Jeanene Kroetch: Absolutely. Absolutely.

Deb Zahn: That's great. And so there is always the problem of, we know that it's not, "If you build it, they will buy." So there's the other end of working on creating this thing of beauty that you will offer as a product, but then there's also, how do you get people to actually purchase it? And how does that work? How does somebody figure out how to do that?

Laura Marella: I mean, I can speak to it from the standpoint of Overflow in our particular community. So yes, like even when they get to that point that you're describing and they create a product and they have it, a lot of our consultants. A lot of our strategists have a difficult time because there are no marketplaces really for this kind of content. It's not like you're going to post it up on Amazon and...

Deb Zahn: Craigslist.

Laura Marella: So there really are a lot of places actually that you can publish that work for free, but there really isn't anything specifically for this. That's not good.

Deb Zahn: Yeah.

Laura Marella: So our solution is that we can help our consultants to sell their IP, to sell their products and organizations and we promote it on our actual marketplace, on the platform itself. So it's there, it's available on demand to the public. You don't have to become a member of Overflow to have access to it, but we're promoting that marketplace to potential clients. So they can draft off of that effort, essentially. They can build on it with their own marketing efforts as well, but at least provides a platform for marketability for them.

Deb Zahn: That's right. And no matter what, it's an important step. So, when we had our product, we sold it essentially in bulk, where we went to trade associations and folks like that and said, "Hey, your members could really use this. You're going to look like a genius if you give them this." But that's human beings going out and doing things. It shouldn't be the only way to market things.

Laura Marella: Right.

Jeanene Kroetch: I think one of the other things that is intriguing for clients coming onto the platform too, is the fact that not just anybody who wants to come on to Overflow is able to come on to Overflow. And by that, I mean, that members are vetted to have a certain level of experience and a certain adherence to quality standards and comportment that we are looking for from our members. And part of the reason for that is so that when we do have client members come in, we've already taken away one of the biggest pain points for our client in trying to find resources to help them solve problems, which is, "How do I know that this resource is going to be good and valuable and reliable and deliver?" And so that's one of the things that we are doing both with our consultants that are on the platform for our client's consideration and for collaborators on the platform for our consultant's consideration.

Deb Zahn: I like that. So that exclusivity, it's not like Facebook now where everybody can join in, that's a network. It really is, you've got to have the goods to come in.

Jeanene Kroetch: Exactly.

Deb Zahn: I like that. That's great. So how can folks find Overflow if they're interested in checking it out?

Jeanene Kroetch: Well, that's pretty easy. You can go to WeAreOverflow.com, and you can join a waiting list if you're interested in membership. You can go to contact us if there's a particular question you want to ask us. There are lots of places throughout the site where you can click the button and you'll be directed to someplace for more information, but that's the easiest place to find us right now.

Deb Zahn: I love it. And it's a beautiful site. I've been on it. And I really love what you folks are talking about, which is why we're so excited to have you on, particularly to talk about the big ones: isolation and the other one, developing products.

But let me ask, I'll start with you Laura and then Jeanene, you'll get your turn. So obviously you're in the midst of a startup, so me asking you a question about life balance might be mean, but I'm going to do it anyway. So either looking forward or looking back, how, what do you, what do you envision as balanced for yourself and bringing that into your life, however you define that?

Laura Marella: Yes. So I probably have generally been the poster child for the lack of work-life balance through most of my career. And I think that had a lot to do with the fact that I just really found it difficult to set boundaries. And I think that if I were to go back and correct things in my life, I would have set stronger boundaries for the flow of work toward me, the expectations for responsibility and things like that I took on. And I think that's the thing that I've probably, if I were to say, I like presently can't necessarily achieve that, but that's what I'm definitely working toward.

And I think when I think about Overflow, I put myself in that position. And when we created Overflow, we put ourselves in the position of the consultant who is really trying to prosper but also not prosper at the sacrifice of having a life. And so making work easier, making work faster, quicker, better quality, less effort into it. And then the whole idea of productizing, what you do and alleviating that need for that hourly wage or that day rate, I think is really what has come to my mind as a way to get there. Allowing people to choose when they work, who they work with, and when they do it, all of that I think has been the lesson I've learned from a life of not really having that balance.

Deb Zahn: That's right. So I want everybody to rewind and listen to that again because the things that you mentioned about enjoying one of the benefits of being an independent consultant. If you construct it that way, I think that's powerful. So Jeanene, how about you?

Jeanene Kroetch: I think it's kind of ironic that in order for Overflow to have created a product that will help people to obtain life balance, that we've had none for the last year.

Deb Zahn: I totally hear you.

Jeanene Kroetch: Yeah. But I think it's something that, for me, I was kind of looking at what I want my life to be. And I was looking at probably the last third as people, so eloquently call it and try to see how I could make space for the things that were really important to me and still continue to feel challenged and useful and valuable. And I think that one of the things that was really appealing to me, that we haven't really spoken about much, but is the fact that Overflow is a public benefits corporation and a pending B Corp at this point, which means basically that we are looking at value that we place out there in the world that is not just shareholder value. It's stakeholder value. So it's for everybody that touches the company up and down the line.

So for me, that gave me a sense of being able to have some balance within my work. So my balance wasn't required to step outside of work to find it, if that makes sense.

Deb Zahn: It does.

Jeanene Kroetch: And that's one of the things that I think has also been appealing to people when we talk about Overflow, whether it's someone who's very young and starting out who was very purpose-driven in the work that they do, or someone like me, who is looking to make sure that what they do has value and is just not contributing to the noise out there.

Deb Zahn: Yeah, yeah. Or just about making money. Making money is nice, but if that's the only reason I don't get it. Well, I want to thank you both so much for coming on. And I'm excited that Overflow is going to be going live. Is there a live date? I know there's a waiting list right now.

Jeanene Kroetch: Actually we are in a beta situation. I guess it's more of an alpha situation right now, with our founding members, and we're getting people onto the platform right now. And it will be live in June. We're in June already, so we'll be making a concerted effort to reach out to the public during the month of June.

Deb Zahn: Wonderful. Wonderful. Well, thank you so much for joining me today. I really appreciate it.

Laura Marella: Thank you for having us.

Deb Zahn: Thanks so much for listening to this episode of the Craft of Consulting Podcast. I want to ask you to do actually three things. If you enjoyed this episode or if you've enjoyed any of my other ones, hit subscribe. I got a lot of other great guests that are coming up and a lot of other great content and I don't want you to miss anything. But the other two things that I'm going to ask you to do is, one is, if you have any comments, so if you have any suggestions or any kind of feedback that will help make this podcast more helpful to more listeners, please include those.

And then the last thing is, again, if you've gotten something out of this, share it, share it with somebody you know who's a consultant or thinking about being a consultant, and make sure that they also have access to all this great content and all the other great content that's going to be coming up.

So as always, you can go and get more wonderful information and tools at craftofconsulting.com. Thanks so much. I will talk to you on the next episode. Bye-bye.