

# TIPS FOR BEING AN EFFECTIVE EXTERNAL ORGANIZATION DEVELOPMENT CONSULTANT

Mark Sachs & Associates  
Organization Consulting and  
Executive Coaching  
705 McNeill Road  
Silver Spring, MD 20910  
ma.sachs@verizon.net  
www.markasachs.com

**Being** an external organization development consultant can be a life changer for many people. You have a lot of freedom to work with whomever you would like, not to mention the potential to have a decent income. That said, it also means a lot of work behind the scenes and with clients, and it can sometimes be very draining and challenging. The information in this handbook was provided by a number of very seasoned organization development professionals, and hopefully it will provide you with some helpful insights.

## **Managing Yourself**

- If at all possible, do only what you LOVE to do. There are lots of colleagues who can do the things you don't love. If you refer out the business you don't love, the business you do love can come back to you.
- When you are planning on becoming an external, it is important to look at things through a lens of abundance rather than scarcity and not get too high with the highs and too low with the lows.
- Don't wait until you have everything "perfect" (i.e. website, business cards, etc.)...If you keep saying, "when I do \_\_\_\_, I can start", you won't take the plunge!
- Let go of those things over which you have little or no influence or control.
- It is important to manage and command your own thinking.
- As much as it is important to look out for your client's needs, it is equally important for you to look out for your needs.
- Maintain a centering practice, whether it is meditating or some other way of being calm.
- You may find it to be helpful to journal about what's going on with you as you're on the external consultant journey.
- So much about this journey is about your ability to set boundaries and limits and your willingness to tell others what you want.
- One of the best ways to manage yourself during the process of transitioning to external is to follow your gut feelings (whole brain or intuition – the 'gut' has so many brain cells in it).
- If possible, look for opportunities to work and consult with colleagues as you develop your practice.
- Submitting proposals or going to an introductory meeting and then not getting the work is a part of the process. It isn't necessarily about you – it's more about the process than about business.
- When people don't return your phone calls or e-mails or don't return them in a timely way, it may have little to do with you.
- People will often offer to do something that may be of help to you but sometimes they won't follow up. This can be a common occurrence.
- Remember the 80/20 or 90/10 principle. If someone has a strong emotional reaction to you, it may have 80-90% to do with their own

issues and only 10-20% about you. Of course, it is also important for you to own the portion that relates to you.

- If you are having trouble focusing at home, go to a coffee shop. Often the lack of distractions and proximity of other people can support you in focusing on a specific deliverable.
- Consider the changes to your day-to-day routines. Designing and sticking to new structures will help you develop new habits.
- Plan outings with colleagues and friends on days when you're working in your office (especially a home office). Doing this will help you increase your connections to the outside world.
- Never turn on the TV during the day, stay away from the refrigerator and increase physical activity. (It's surprising how many calories you used to burn walking to meetings, the restroom, cafeteria, parking lot, Metro, etc.) Also, limit email, websurfing, and most dangerous of all, online shopping. You'll save \$\$, have more time for marketing and client development, and you won't wind up in your pj's and slippers at dinnertime feeling like you did nothing all day.

### **Integrity**

- Be impeccable with your word, ethics, and professional demeanor. Deliver beyond what you promise. Respond quickly to client requests. Spend extra time on contracting to establish a healthy client relationship. (This cannot be overemphasized!) Take responsibility, walk away, and don't charge if things go sour.
- Be clear about the meaning of "confidential" vs. "anonymous."

### **Personal Development**

- Keep up your own personal development – classes, conferences, books, etc.
- Make sure you attend to your physical, emotional, mental, and spiritual needs in whatever ways that work for you. This also gives you permission to treat yourself as you might advise your clients.

### **Accepting Work**

- Accept work only if you believe you have the skills/capabilities to do a good job and/or you believe the organization has the same values that you have.
- Know when to call in a partner to complement your skills.
- Accept work that will allow you to succeed and protect the conditions of your success. Be generous with your time, your input and your nurturing (while minding your boundaries and the scope of the project). In our business, which is based on relationships, it is often more important to give than to get. The more generous you are with your

time and expertise in the pursuit of building relationships with potential clients, the greater likelihood you will be successful in landing work. Quality is a niche in the current market.

- When considering accepting consulting/coaching engagements, an important thought should be the effective/efficient use of your time.

### **Meeting with Your Client**

- Do your personal work before meeting with clients. Who are your ideal clients? What is your style? How does your background influence your work? Think about your niche, your “brand,” and the results your potential clients can expect. Reflect on your past successes and what contributed to them.
- Be extremely clear about your offer – what you can and can’t do. Be comfortable and unambiguous when communicating your offer, especially to those who don’t speak “OD”. Learn to translate what you do into language that makes sense to potential clients. No one has ever said that a consultant has been too clear!
- Prior to meeting with people to talk about possible work, think of a time when you did OD work that you really enjoyed. That enthusiasm will shine through.
- Despite the fact that you may have lots of experience and/or you are a very competent OD person, the most important thing to keep in mind is you need to find out what your client’s needs are. If you can’t meet their needs, nothing else makes much difference.
- Before pitching yourself, gather as much data as possible about the client or client system so you are able to best pitch work that will meet their needs. The internet is great for this, as are your clients, colleagues, and competitors.
- Listen, listen, listen!
- Your awareness needs to reflect what is good for the client system rather than how “smart” you are.
- Ask your potential client “what keeps you up at night?” and then listen and reflect back what you heard before you explain what help you may offer.
- For your first meeting, it is better to overdress than underdress.
- After your initial meeting with a client, consider sending a thank you letter rather than an e-mail. Remember, a letter is the thing with a postage stamp on it! Sending a letter shows the potential client you are more deliberate about thanking them than if you just dash off an e-mail to them.

## **Working with Your Client**

- Start with where your client is today. In this context, what you believe the client should be doing today is much less important than what the client is able to do today. Look out for “blind spots”. Look for what is missing from the picture.
- Be aware that some leaders may feel threatened if their staff starts looking to the OD consultant as the leader. Make sure the boundaries are clear.
- Make sure that you are not working harder than your client system is.
- Make sure you include the client in the intervention design.

## **Entry and Contracting**

- From the first minute you have contact with your client/client system, everything is data.
- Be careful about climbing the “Ladder of Inference” too quickly.
- If you feel something in your gut, don’t hesitate to ask questions. If you have concerns or questions and they aren’t sufficiently answered in the early phases, there is a likelihood they may show up later, which may be too late. As much as you may feel you are the perfect consultant, moving ahead without carefully considering your concerns can get you in big trouble. It is perfectly OK to turn down work if it doesn’t feel right.
- When meeting with a client, if you don’t pick up on something right away, don’t consider it a lost opportunity. Give yourself permission to get back to them and don’t feel like an idiot for not bringing it up during your first meeting with them.
- Do your best to contract directly with the true client. This can eliminate confusion about deliverables and/or outcomes. Many leaders like to send a representative to be the official client. If that is the case, consider requesting a “status session” with the leader after you and the representative have done some planning. Let the representative lead the session and you take the opportunity to ask the leader their thoughts and feelings about the plan.
- Be on the lookout for possibly re-contracting with your client. Once you get into an engagement you will learn new things that will affect your ability to do your best work with them.
- Whenever possible, design your contracts to ensure you are in the organization long enough to determine if you have made a difference. This will provide dividends for the client/client system and for you. Consider a couple of evaluations – after the first intervention and six months later.
- Design your work so there is some follow-up, e.g. phone, e-mail, evaluation with your client and/or members of the client system. For many reasons, that will be very helpful information.

## **Subcontracting**

- When you subcontract and have done what you've contracted to do, you should be paid by the contracting firm, regardless of when – or if – they are paid by the client, unless your contract states differently.
- Many contractors with whom you may subcontract require that you work only through them for future work. Be clear in your contract about future work. Also, think carefully about the effects of any “non-compete” clauses that may be in your agreement with the contractor for whom you might work.

## **Rates**

- Decide what you are worth in the marketplace. What rate can you comfortably tell a client, eyeball to eyeball, that you charge?
- If you are unsure about your rate, it may be better to come in somewhat high and go lower, rather than go in low and try to come up higher. If over time you rarely hear complaints about your rate, it may be time to increase it.
- Be clear about the value you are delivering, and charge appropriately. Even if you choose to do pro-bono work, make sure there is some kind of exchange or quid pro quo (e.g. in exchange for pro-bono work, the client can agree to help spread the word about your business if they are satisfied, you can put the organization's name on your resume, and/or you can use them as a reference). Consider charging even a nominal fee rather than doing pro-bono work. Clients often value the service more when they pay for it.
- While you should be sure not to give your work away, do not get caught up with nickel and diming the client. Try to do your work for a fixed contract versus an hourly or daily rate.
- If you choose to reduce your rate for a client, include in your invoice what you are charging, what your full rate would be, and that the difference is an in-kind contribution to the organization.
- When deciding on your rates, remember to take into account time spent for pre-meetings, preparation, delivery, and follow-up meetings.

## **The Business**

- Internals who are interested in being an external may have the mistaken impression that externals have lots of freedom, and externals who may be interested in becoming internals may have the illusion that internals have a lot of security.
- Know that you as an external, will be super lucky if you manage to break even, particularly in the first year.

- If you love the work, stick with it for at least three years – if financially possible, before determining whether or not the business can survive.
- Put 50% of what you generate in revenue into savings to use for expenses/low months/retirement, etc.
- Being organized is key!
- Look for a trustworthy accountant, bookkeeper, and attorney to support you. You may want to outsource some of your administrative needs.
- Check out how best to legally structure your business and which insurances you may need to purchase.

## **Marketing**

- One of the most important things to remember as you market and network is that everyone you know might be a potential client or have friends/acquaintances/colleagues who could be potential clients. It is extremely important that you meet with as many people as you can to introduce yourself and learn about their needs.
- In addition to meeting new people, make time to stay connected with a wide range of people from your past. People you have worked with before know you and are likely to hire or recommend you when the opportunity arises.
- If you are leaving or have left an organization, you may be able to continue to work for them in an external capacity.
- When you connect with someone professionally, make sure you don't lose that connection.
- Keep your name in front of your clients and potential clients on an ongoing basis. You never know when a project will land on their desk. Remember out of sight, out of mind.
- As you pick up new clients, make a note somewhere about how you found them, whether it was your meeting them personally, through a referral, subcontracting, etc. This can be helpful for future marketing. It'll be important for you to have the list to refer back to because it may give you ideas of people you may want to contact/network with for additional work.
- Landing an engagement may take three to five times longer than you ever expected. If you talk with a client and you are excited about possible work with them, don't let up on continuing to market to others. The more irons you have in the fire the more likely you'll be to land work.
- Be able to explain the benefits of OD and how they impact the bottom line. Since some clients may not know "OD" speak, use common words and phrases.
- Consider developing a website at your earliest convenience. Doing that can help you define your offerings and provide background about you as a practitioner.

- Decide who you are and what services you can contribute. What is your potential “value added” to a client system? Consider offering a “breakfast information” meeting that includes giving away one of your favorite assessments. The attendees place their business cards in a bowl and draw to determine the winner, and you have the contact information for all of the participants. The topic of the breakfast should be one that you are passionate about.
- Consider joining different organizations so you can get more exposure.

## Networking

- Build and nurture your network. Stay in touch with close colleagues with whom you can partner or use as a community of practice (great for advice in difficult situations); senior colleagues who may be mentors from whom you can learn; powerful people who can grant you access; and younger colleagues who you can mentor and help. The health of your network will reflect how much emphasis you place on building relationships, how often you seek opportunities to do favors for others or pass on interesting business, and how much you care for people vs. business opportunities. Consider not charging referral fees to nurture your network, allowing good karma – what comes around, goes around.
- Consider doing an “appreciation dinner,” another type of event, or otherwise recognizing/appreciating those people who have given you work or who have been particularly helpful to you.
- Consider meeting monthly with colleagues over coffee, lunch, or dinner so that you support each other and compare notes about any successes and worries about your business.
- Network beyond the OD community – develop good relationships with others who can complement your OD work (IT specialists, marketing, communications, business people, etc.). OD rarely stands alone as a discipline.
- Check out the Chesapeake Bay Organization Development Network, [www.cbodn.org](http://www.cbodn.org). It has many resources for external consultants.

So, there you have it. As you can see, there are many things to consider and reflect on. As an external organization development consultant and executive coach for more than 20 years, I’ve had many of the ups and downs that are mentioned. That said, this work has been a blessing for me and I’m grateful to be doing this work that I love, and my clients have found the work to be helpful. If you have any questions and/or you’d like to talk about your journey, don’t hesitate to contact me.

*Mark*



Following are additional resources:

- Bellman, Geoffrey, (1990), "The Consultant's Calling: Bringing Who You Are to What You Do", San Francisco: Jossey-Bass.
- Block, Peter, (2011), "Flawless Consulting: The Guide to Getting Your Expertise Used", San Francisco: Jossey-Bass.
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- Lippitt, Gordon, and Lippitt, Ronald, (1994). "The Consulting Process in Action", San Francisco: Jossey-Bass.
- Nevis, Edwin C., (2001). "Organizational Consulting: A Gestalt Approach", New York: Gardner Press, Inc.
- Schwarz, Roger, (2017), "The Skilled Facilitator", San Francisco: Jossey-Bass.
- Weinberg, Gerald, (1986). "The Secrets of Consulting", New York: Dorset House Publishing.