Journey to Becoming a Consultant

PASS Professional Development VC 2015.04.08

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About David Klee

Microsoft MVP Most Valuable Professional

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Specialties / Focus Areas / Passions:

- Performance Tuning & Troubleshooting
- Virtualization
- Cloud Enablement
- Infrastructure Architecture
- Health & Efficiency
- Capacity Management

- High Availability
- Disaster Recovery
- SQLPASS Virtual Chapters
  - Virtualization
  - HA / DR
  - Performance

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What is a Consultant?

- con · sult · ant
  /kən ˈsəltnt/

  - a person who provides expert advice professionally
    - Synonyms: adviser, expert, specialist, authority, pundit, counsel
- Expert at recognizing problems and developing solutions
- Art of making connections

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Why become a consultant?

- Niche skillset
- Variety
- More responsibility
- Continuous learning
- Grow skillset
- Results
- Moving upwards

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Definitions

- Start with WHY?
- Define success
- Success requires more than just the *desire* to succeed
- No "right" answer

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Ask Yourself...

What do you enjoy doing today at your job?

What are you unhappy about at your current job?

Where do you see your career evolving?

What type of a person are you?

Do you like job security?

What is your work style like?

Is your family comfortable with some level of risk?

What niche or specialty do you fill?

Do you like fast-paced variety?

How are your interpersonal skills?

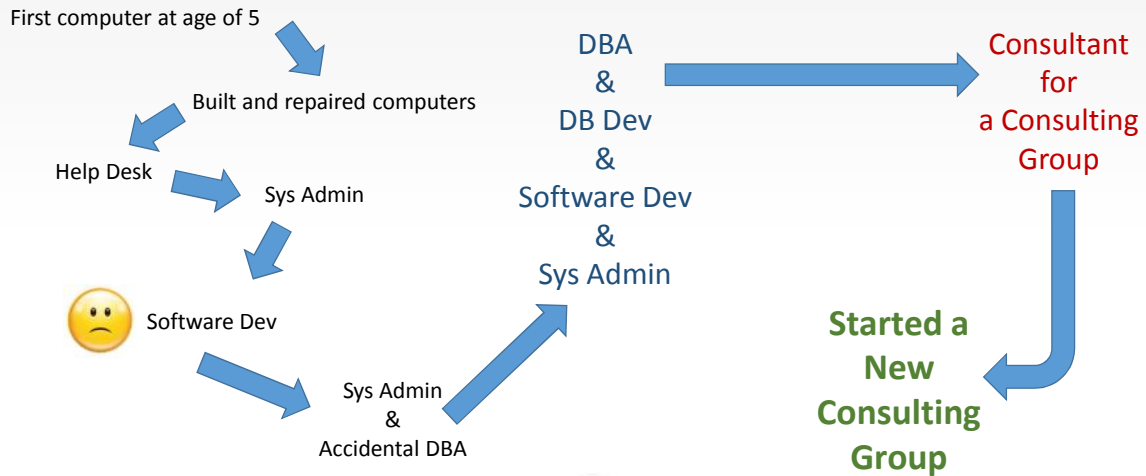Do you have a solid safety net and back-out plan?

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My Career Path

First computer at age of 5

Built and repaired computers

Help Desk

Sys Admin

Software Dev

Sys Admin
&
Accidental DBA

DBA
&
DB Dev
&
Software Dev
&
Sys Admin

Consultant
for
a Consulting
Group

**Started a
New
Consulting
Group**

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Paths

Consulting for an Established Consulting Group

Starting a consulting group

You

Contracting

Building a Business

Lifestyle Business
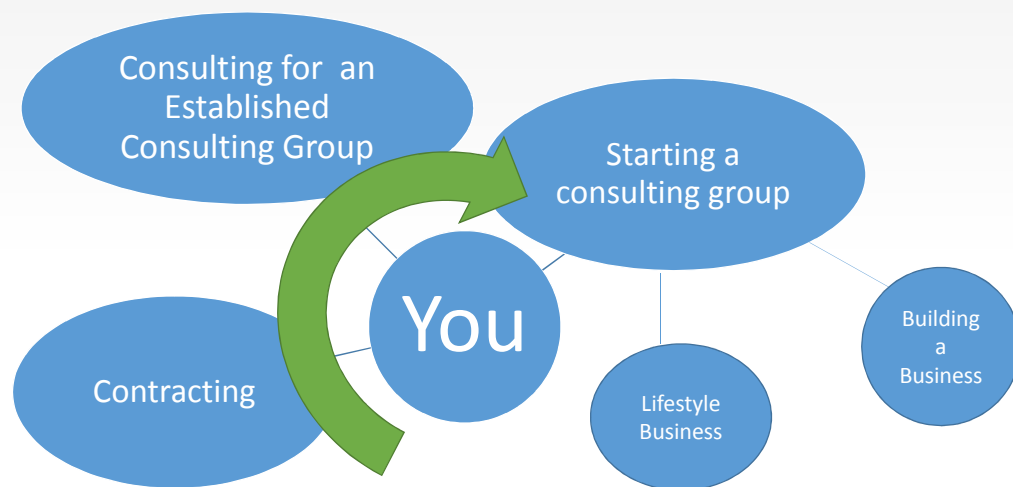
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Risk Levels

Consulting for Someone Else

Contracting

Consulting for Yourself

Starting a Consulting Group

RISKY

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Consulting

For Someone Else

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Consulting for Someone Else - Pros

- Less risk than other paths
- Steady salary & benefits
- No dramatic financial overhead
- Paid time off
- Can gain incredible experience
- Great mentors

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Consulting for Someone Else - Realities

- Intense
- Good at interviewing?
- Tough to chose your projects
- Potential for high travel & long nights / weeks
- Must learn to learn – quickly
- Will grow skillset quickly
- Must be adaptable and flexible
- Comfort zone
- Balance

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Consulting for Someone Else – (Mis)conceptions

- Travel is *not* glamorous
- Consultants have a bad reputation
- Technically smart != Great consultant
- Technically smart != Greatest asset
  - Interpersonal communication

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Getting Started Consulting for Someone Else

- See Brent Ozar's questions you should ask before you take a consulting job
  - https://ozar.me/2015/02/questions-you-should-ask-before-you-take-a-consulting-job/
- What skills do you offer?
- How do you stand out?
- Why should they hire you?
- Start talking to the #sqlfamily!

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Contracting

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Contracting - Pros

- Minor risk
- Lucrative
- More flexible
- Relatively steady hours
- Many recruiting firms are looking to fill positions
- Gain work experience

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Contracting - Realities

- Contracts are not always back to back
- Must have padding between projects
- Benefits and taxes
- Contracts
- Dispensable
- Must maintain in-demand skills
- Job security
- Recruitment agency

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Contracting – (Mis)conceptions

- Work does not just 'come' to you
- Must be a part of the contract agency relationship to the client
- Taxes and insurance
- Personal risk / liability

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Consulting

Lifestyle Consulting

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Lifestyle Consulting

- You now wear many hats
- You and maybe a few others
- Small business formation
- Shorter-term projects at higher rates
- More specialized / in-demand skillsets required

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Lifestyle Consulting - Realities

- Everything from consulting applies
- … and now other things to balance…
  - Branding
  - Constantly finding work
  - Bookkeeping & admin
  - Contracts & negotiation
  - Marketing & presales
  - Family impact
- High energy & sacrifice

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Lifestyle Consulting - Realities

- FOCUS and interruptions
- Legal
- You will never be prepared for the volume of work
- Finances
  - And finances between projects
- Exit plan?

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Lifestyle Consulting - Balance

- Work / life balance

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Lifestyle Consulting - Pros

- You are (almost) your own boss
- Pick your own direction
- Pick some of your hours
- More flexibility
- Less likely to be caught up in corporate politics

24

Lifestyle Consulting - Requirements

- Financial padding during startup and ongoing
- Strong support system
- Mentors
- Business alliances
- Good lawyer
- Strong and thorough contracts
- Take-charge personality
- Focus on strengths, outsource the rest

Rates and Hours

- Much more difficult to calculate
- Startup costs higher
- Double whammy on time off
- How valuable / in demand is your service?
- Many different rate calculators

Money Flow - FTE

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Money Flow – Consultant FTE

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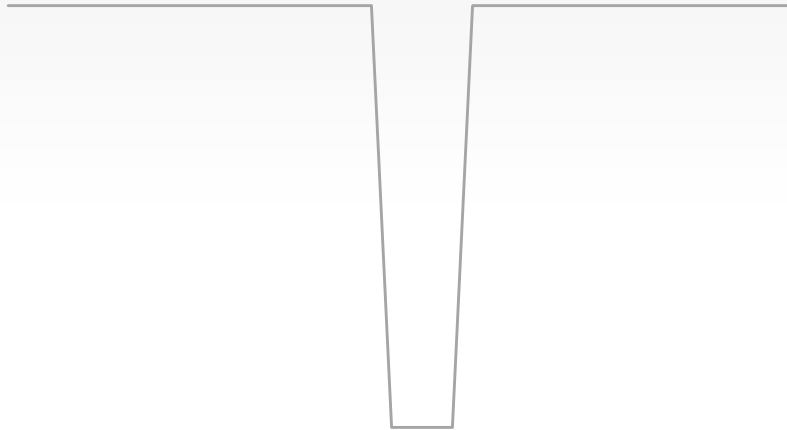
28

Money Flow – Contractor

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Money Flow – Consultant

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Consulting Group

Starting a Scalable Business

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Are You Insane?

YES.

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Scalable Consulting

- Everything you do becomes a process
- The focus is now on sales pipeline & delivery
- Efficiency
- Streamline and automate

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Scalable Consulting - Realities

- Emotional rollercoaster
- Much greater overhead
  - Insurance
  - Paperwork
  - Processes / practices
  - Legal
  - Pre-sales
  - Financial
  - Work week
- Much higher risk

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Lessons Learned (to date)

- Surround yourself with mentors
- Take everyone's advice with a grain of salt
- Be the mentor you wish you had
- Strategic alliances are a must
- Run lean
- Mistakes will happen. Don't look back.

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Which Direction Is Right For Me?

- IS consulting the right fit?
- Weigh the risks, rewards, personal and family impact

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Questions?

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Thanks for attending!

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