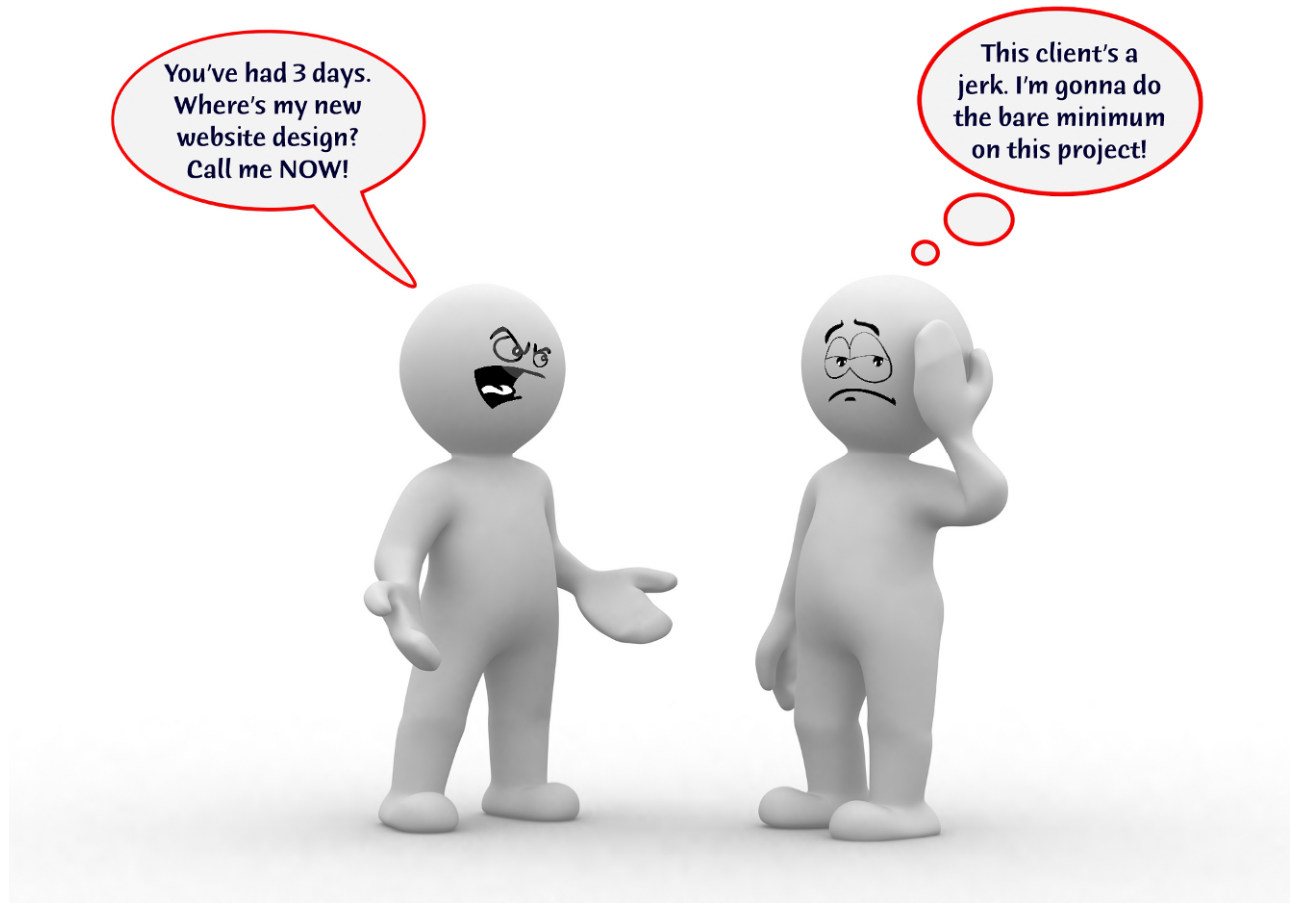


20 Ways To Get the Most From Your Independent Consultant



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What do all successful ecommerce store owners have in common? They focus on what they do best, and hire out for the rest. If you want more than a kitchen-table business, it is smart business to hire professional consultants to do what you're least skilled at, so you can do the core work you got into business to do. Odds are good that you'll end up hiring at least one self-employed independent consultant - an advisor, technician, developer, designer, or other expert.

I was a self-employed Web consultant for over five years, helping hundreds of ecommerce site owners optimize and improve their sites. Throughout these years I observed the best and worst of client behavior, which affected how I worked for each client. This eBook has my top advice for how to deal with *your* consultants. I am going to be blunt and let you know what your consultant wishes you knew but won't say it out of fear of offending you. You're about to learn what 99% of people who hire independent consultants never learn.

You might be asking, "Isn't it the consultant's responsibility to build a positive relationship?" It's not about responsibility; it's about getting the best results. If you treat your consultant poorly you could get lower priority, overbilled out of resentment, fired as a client, or your reputation in the consultant community tarnished. Always keep in mind that consultants need clients, but they don't need *any particular client*.

The upside is, if you develop a positive relationship with your consultant, you will get significantly more than your money's worth. Remember these twenty suggestions and you'll be well on your way to an enjoyable and profitable relationship with any consultants you hire.

1. ***Your consultant is not your employee.*** He is independent for a reason. He might hate having a boss. He might have a hard time working on a set schedule. He might have a family situation or physical reason to work outside the corporate environment. Regardless of the reasons, if you think your money buys the consultant or makes him subservient to you, you're at complete odds with his belief system. If you give him an order, such as, "call me as soon as you get this message," you're treating him in a way that causes resentment and even anger.

Legal note: the IRS definition for an independent contractor includes not having a requirement for specific times and places to work. In other words, if you require your consultant to work in your office and/or at set times, then he's an employee according to the IRS, and you must withhold income taxes.

2. ***You are not his only client,*** so he has to balance his time between you and his other clients. This means that he is not "on call" for you (unless you work out special terms for this). There will be times when you want an immediate response, but he's working on another deadline or dealing with an emergency for another client. Unless you're willing to cover 100% of his billable hours so he doesn't have to have other clients, be understanding of his situation. In addition, a consultant will work when he's "on," and take time off when his brain is fried, so one day he might work 18 hours and take the next day off to rest. You want this, because you're only paying for actual productive work time, unlike the 60% of time *employees* spend being unproductive. Knowing this, be sure to inform your consultant when you have projects coming up so he can prepare his schedule.

3. *Communicate in the way the consultant wants to communicate.* In my experience, most clients prefer the telephone and most Web consultants prefer email and instant messaging. This can cause some stress as the client wants to talk on the phone all the time, and the consultant tries to avoid this. Let's look at the reasons consultants prefer email and instant messaging:

- A. Once a phone call is over, there is no record of what was said except each person's notes. Unfortunately, these often conflict, especially near the end of a project when the client remembers requesting one thing and the consultant remembers, and delivered, something else. Emails and instant messages leave a typed record of conversations that can be referred to later.
- B. Most consultants multi-task all day long, bouncing between projects based on mental state, the urgency of the project, and whether others have answered questions or provided information required for a task. It's possible to answer emails and instant message while working on something else, but a telephone call requires 100% of the consultant's attention, and, therefore, doesn't fit into a typical work plan.
- C. Most questions require some form of research or testing before answering. Asking questions on the phone means either the client sits on hold while the research is done, or the question is put off to be answered later. It's simply inefficient. Think back to your last call with a consultant - did you wait while he looked something up or tested something? Probably. Keep in mind that phone call time is billable just like any other task.
- D. Consultants work odd hours. Emails can be read and responded to 24 hours per day, but rarely does a client want to do a 3 am phone call. So you'll often get a faster response to an email versus waiting for a phone call.
- E. Emotions get involved during telephone calls. While an email can be delayed and reviewed before sending, words said during a call cannot be taken back.

4. *Plan ahead.* Your site is *your* baby, not the consultant's, so it's your responsibility to determine what you want and communicate that clearly. A consultant will only do what he is hired to do. Sometimes he'll make recommendations along the way, but, if you ignore them, he'll most likely do what you want even if he thinks it's stupid. So, be sure you have outlined and explained everything you want in advance, as well as provide all the needed items (text content, images, color schemes, logos, etc.) that will be needed *before* the project begins. Here's an actual example of why it's important to provide detailed specs in advance:

A client hired a consultant I know to create a customized shopping cart system. He wanted a step by step system, hard coded, so a customer can pick a product, then, with each step, make add-on selections (picture Dell.com's computer configurator). In the initial project request, certain options were available at each step, and selections lead to different pages and other options. Everything went great and the site went live. Then, the client decided he wanted some changes in the first set of options. These changes dominoed to the rest of the custom configuration, obliterating the custom code created in the first place. It turns out he knew he wanted this at the beginning, but didn't think it mattered and figured it could be "added later." If the details were given in advance, there would have been no additional cost. By adding the new requirement after the fact, it ended up costing about 50% of the original project cost to completely redo the cart.

5. *Ask for everything you want*, no matter how ridiculous or impossible you think it is. Your consultant might tell you it's not possible, or it's a quarter of a million dollars, but he also might say, "oh yeah, that's an easy one." I've had clients who struggled in silence for years with something, then, when finally saying they wished something was different, I was able to fix the problem in minutes.

Your relationship with your consultant should be an ongoing conversation about what needs to be done and what you would like to see. I have often conversed with a client about one project, only to be able to recommend some high-value changes in another area that increased conversions dramatically. Don't forget to compensate him for his valued advice!

6. *Be honest about your deadlines*. Time estimates and deadlines are a strange dance between clients and consultants. Clients cut their deadlines short in the hope of getting priority from consultants. Consultants underestimate how long a project will take because they're in denial about interruptions, debugging, and scope creep. The solution is to be completely open and honest about this up front. Tell your consultant your true deadline, and, when given a time quote, tell him you plan to double it and would be very pleased if it came in sooner.

Money is a great motivator for meeting deadlines, but as a carrot, not as a stick. For example, if you have a deadline of six weeks, you can provide incentives in two ways. Typical clients will say, "if you're late, then I will deduct \$xxx from the final payment." This is terrible psychology. Instead, make a payment proposal that has rewards for on-time and early completion. For example: "We need the project as soon as possible. Based on your estimate of three weeks, I'll assume it will be six weeks. So, let's do this. If you complete the project in five weeks, I'll add a 10% bonus. If you complete it in four weeks, 15%, and three weeks, 20%."

7. *Lack of planning on your part does not constitute an emergency on your consultant's part*. In other words, if you waited too long to hire a consultant or to give a project to your current consultant, don't expect him to drop everything, unless you're willing to pay for it. As I mentioned before, you're not his only client. For him to put off other clients, or put off personal activities like time with family or a trip, you must be willing to compensate him in higher hourly fees or a bonus of some sort. It's possible, due to other commitments, that he can't meet a short deadline at all.

8. *Don't expect 100% detailed proposals*. Some consultants give highly detailed proposals, with hours broken down, software needed, etc. I used to do this and found that two-thirds of the time the potential client took my document to other consultants and shopped around for lower quotes, or even did the work themselves after getting a complete breakdown of tasks and what to buy. In these cases, the potential client simply stole the consulting hours spent on the proposal. I learned my lesson and started giving very brief proposals with a total at the end.

If, however, your consultant does break down the proposals by hours, don't come back to him and try to knock off hours on certain tasks or nit-pick the estimates. It's truly impossible to know how long it will take to accomplish each individual task unless he's already done them before. Even then, the unexpected *will* happen. Just like every human is different, every website is different, so what took 5 hours on one site might take 7 on another due to unexpected factors. When putting together a large project proposal,

some tasks will take less time than expected, others more, and it usually evens out. So the total hours at the bottom of the proposal are the hours he thinks the entire project will take. If it's too much money, tell your consultant how much you're willing to pay and he can either take the job or not. If he says no, then find someone else or figure out how to do it yourself.

The last thing you want is for your consultant to work 20 hours on a project but get paid for 15. You might feel like you got a deal, but it's a deal that cost his family much-needed funds. And it's a deal that will bite you back in the long run, with resentment, higher future estimates, and possibly a bad reputation in the industry.

9. *Don't resent his pricing.* Consultant rates are cheap compared to hiring an employee. You don't have to pay the expenses and bookkeeping an employee would require - ongoing income, unemployment insurance, sick days, vacation days, health insurance, 401K, income tax co-pay, office space, phone, computer, stationary, training, time to deal with computer problems and software setup, and on and on. Being self employed, your consultant must deal with all of this, as well as sales, marketing, developing proposals (with four out of five proposals never getting a response), client shmoozing, billing, collections, accounting, and working towards developing a positive reputation through articles, speaking engagements, and more. In my experience, a consultant averages about 20 billable hours a week, out of which at least half of this is taxes and other expenses. While you're thinking he's rich by getting \$90 an hour, he's most likely just getting enough income to justify not having to go back to a cubicle.

A homeowner's water heater stops working so he calls a plumber.

The plumber arrives, looks up and down and around the water heater. He then hits the water heater with a small hammer right above the spigot. It starts working. The plumber hands the homeowner a bill for \$400.

The homeowner is furious. "How can you justify \$400 for 5 minutes work? I want this bill itemized!"

The plumber takes back the bill and writes on it. When he hands it back it is itemized as follows:

Hitting water heater with a hammer	\$5
Knowing where to hit the water heater with a hammer	\$395

When you choose a consultant, don't just look at the hourly rate. A consultant who takes 10 hours to do a project and bills \$50 per hour (\$500) is much more expensive than the consultant that does the same task in 5 hours at \$75 per hour (\$375). When you see a high hourly rate, and their references check out, you'll do better with them than the cheaper amateur who can't get a high rate due to inferior work. Appreciate your consultant when he bills you, as, unless you've hit on a rare con artist, you're most likely being underbilled and getting more than what you paid for.

10. *Don't pick apart hourly reports.* If your consultant provides an itemized hours report, don't look at the 20 hour report and say, "This task that you said took 3 hours I think should have taken 2." You should either trust your consultant enough to trust his hours reports, or fire him and find another. I've never understood someone who gives access to his business' inner workings (his website) but doesn't trust him enough to believe how many hours he says it took to do the work. In my experience, your consultant is probably already billing you for half of the time it actually took to complete the project because he knows non-techs don't understand how long this type of work takes.

11. *Pay what you agreed to pay and don't screw your consultant.* The value of work usually goes down in your mind after it is complete. If your site goes down on Black Monday, you're probably ready to pay hundreds or thousands of dollars for someone to fix it. Once it's up and going again, you'll start thinking it really wasn't worth quite *that* much. Fight that impulse. If your consultant helps you, he deserves what you agreed to pay them. Think about the long term relationship, as your site will go down again, instead of those few short term dollars.

If you decide to screw your consultant, you might feel proud of yourself that you got something for nothing. But that consultant knows most everyone working in their niche, and word WILL get around about what you did. If you have a true problem with the work, and you're tempted to not pay, find an independent third party you both trust to mediate and determine what should be done. When in doubt, pay. Odds are good, since you don't really know what it took to complete the task, that the consultant is justified in his invoice. Avoid looking for small details that you feel were not done properly and using them to justify not paying the entire invoice. While consultants are usually quite nice, I can tell you from *personal experience* that companies have been put out of business by a consultant-scorned.

12. *Understand the limitations of the Web.* Many times my clients sent me Photoshop files of Web layouts they had graphic artists create for them. Often the layouts were done by print artists, not Web designers. Print artists rarely understand the limitations of the Web. I've also had clients ask for things like, "wrap the text around that circle, and I want it to be Charlotte Sans font." Unless each page is 100% graphics, this isn't possible.

Some Limitations of the Web

- A. There are only a few fonts that every computer has installed (Arial, Verdana, Courier New, Georgia, and Times New Roman), so you're limited to those font options for your site's text (unless it's in a graphic).
- B. Line spacing, character spacing and paragraph spacing are easily altered in print, but are highly limited with HTML. There is more flexibility with CSS, but still not like print.
- C. Text can't wrap around a shape, like around a circle, on a site, unless it's in a graphic.
- D. Every browser and every computer configuration is different, so the more complicated your layout, the higher the possibility it can't work with every browser on every computer.

In addition to layout limitations, there are functionality limitations based on whatever software/platform your site is on. Sometimes what you want is simply not possible. And sometimes, when a feature sounds easy to you, it can be massively complicated and time consuming, and therefore expensive. There's nothing worse for a consultant to hear than, "I want what Amazon has..." since Amazon has teams of developers and features cost millions of dollars.

13. *Listen to your consultant.*

A woman has been suffering with a sore throat for two weeks. She goes to her doctor for help. After some tests, the doctor informs her she has strep throat and prescribes antibiotics. The patient then replies, "I think I have mono, so instead of antibiotics, I'll just stay in bed for a month."

Crazy, right? Why would someone hire a professional and then not heed his advice?

Crazy as it sounds, even after paying me for my advice, I would estimate only 20% ever listened to it. For some reason a business owner that sells knick knacks online thinks that having a website makes him an instant ecommerce expert, when it really just means he has \$50 a month to spare for hosting. Worse, I've had many clients read an article in a magazine or a blog, attend a seminar, or even speak to someone in a bar (true story), and want to completely change their site based on this "fantastic new information." Usually it's outdated, black hat (bad), or completely irrelevant to the site.

If you find yourself tempted to "act the expert," or to dismiss your consultant's advice, ask yourself if you really know more than your consultant, who is immersed in his field, reads all the latest news and reports, gets training, experiments with solutions, and learns from the results of his work on other sites. Ask yourself, "why do I think I know better?" Usually this comes from a feeling that, as the "boss," you have to know at least as much, if not more, than those you hire in order to be respected. The reality is, people will respect you more for hiring people smarter than you and listening to their advice. The president of Google has never written a line of code in his life and wouldn't presume to second guess his experts, yet he is one of the most respected business people on the planet.

I'm going to repeat this. I can't tell you how many times I've offered up a true gem of a suggestion that could be worth a lot of money, only to be ignored while the client enjoys himself talking and showing how much he knows. If you know as much as your consultant, then you don't need him, so don't act like you do. Instead of proving yourself to him, listen to him, and you'll reap surprising benefits.

14. *Don't ask your consultant to take a percentage of sales instead of money.* Unless you're proposing a true legal partnership with a high payout to offset the risk of never seeing a dime for his work, he will either decline or, worse, he'll accept and do as little as possible until the money actually starts coming in. Two things happen when a deal goes from money-for-hours to percentage-of-sales. One, the client immediately starts to think of the consultant as a full time employee and resents when he works on anything else. Two, the consultant starts feeling like he's being asked to do too much too soon with no actual money to show for it. It's a bad deal all around, and better left out of the equation.

15. *Pay up front.* It's risky, yes, but two things happen when you pay up front. One, you become your consultant's favorite client and therefore get priority service. Two, your consultant now has money to live on and can turn away other projects to work on your project, instead of having to take on other work to make up for the money shortfall until you pay the balance. It's amazing what happens when you pay up front. The benefits far outweigh the risk, in my opinion, if the consultant you're using has a good reputation. I can tell you that it's *much* more frequent that clients don't pay what they owe than consultants not doing the work they were paid for.

16. *Don't steal work by duplicating it on other sites.* For example, if you hire a consultant to code special functionality, then copy the code to three other sites, you are stealing that work in the same way as if you'd make copies of a DVD movie for all your friends. The reality is, the code that was developed is the property of the developer, not you, unless you specifically agreed to, and paid for, the rights to that code. Not only is this the law, it's also how your consultant sees it, so when he finds out, you can expect to either be fired as a client or for your status to be lowered greatly.

17. *Don't make your disagreements public.* If you're upset, it could be tempting to post a complaint to an industry forum, or gossip your complaints at events or online. If you choose to do this, consider it the end of your relationship with your consultant. There is no going back, no repairing the relationship, and quite possibly you could get into legal trouble, even if you're right. It is much more professional, and better for everyone, to deal with issues privately, so they can be resolved and the relationship salvaged.

18. *Your experiences with other consultants are irrelevant.* If you got ripped off by a previous consultant, don't expect your new consultant to take less money because you have less. If your previous consultant was a jerk, don't treat your new consultant poorly assuming he will be a jerk, also. Honestly, when a client would tell me his "nightmare" story about a previous consultant, I usually assumed the client was the problem and it made me wonder whether I wanted to deal with this person at all.

19. *Give feedback.* Don't tell your consultant you're happy if you're not, and then grumble and harbor bad feelings behind his back. Your consultant wants to know how you really feel. Often he could do five minutes of tweaking to make you happy, or adjust his communication methods. On the positive side, if you *are* happy, compliment him. Consultants are often insecure about their work. "Did the client like it?" There's nothing worse than silence. Make the effort to compliment his work and you will be moved up in his favorites list.

20. *Watch your emotions.* Several of the above items have shown that dealing with a Web consultant can be emotional. We're talking about your ecommerce store, your baby, which is personal to you. But it's not that personal to your consultant - it can't be. So, there will be times when your consultant is not emotional about something when you think he should be, because your attachments and priorities are different. Try to understand, and keep things as professional and fact-based as possible.

Did I ruffle your feathers or hit a nerve at all? Because the reality is our perspective is geared towards our own needs and desires, not the needs and desires of the people we hire. It's difficult to continually consider your actions and how they affect your consultant. But it's worth the effort both for your consultant's sanity and for your profitability. Follow the above suggestions, and you'll quickly see better and faster results, as well as enjoy a better relationship with your consultant.

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20. Watch your emotions.

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The male gender is used throughout this eBook for the sake of convenience. Consultants can, of course, be female. No offense is intended.

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