

Consulting (in Writing) to the Corporation: Principles and Pragmatics

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Corporate downsizing in the service-oriented information economy has accelerated the growth of “contingent” employment for writing, editing, and publishing services within organizations in recent years. During the same period, many writers have set themselves up as independent consultants external to organizations. This paper presents an overview of the theoretical principles and research findings that frame the work of writing consultants, along with guidance on the desirable qualities, skills, and knowledge of a consultant and the pragmatics of preparing to work as a consultant.

Introduction

Industries based on communication and information technologies constitute major sectors of the world economy, so “gold collar” workers (Kelley, 1985)—variously called “information architects” or “knowledge managers”—are in great demand to produce, disseminate, and manage information. In the introduction to their guest-edited section in *Technical Communication* on the changing world of the independent worker, Barker and Poe (2002) suggest that structural changes in organizations have effected a change in the role of writers within organizations. They argue that the “ways that the core business model has adapted to the new, information-based development model” now require professionals who are “self-managing, self-educating, but, above all, fluid and flexible.” In other words, the independents and contractors who constitute what Clinton (1997) calls “flexible labor” and Andrews (1996, cited in Barker & Poe, 2002) labels “contingent (i.e., on short-term contract, no promises)”.

Barker and Poe (2002) claim that “the model of contingent employment is becoming a dominant model among employed writers within most organizations”. In an era of “involuntary unemployment”, “delaying”, “right-sizing”, “business-process re-engineering”, or whatever buzzword management uses, the step from contingent to independent worker is one that many take. Zeigler (2000) contends that about one third of all workers at Microsoft are contingent workers, consultants, and contractors. The US Bureau of Labor Statistics reported recently (Williams, 2003) that 84% of contingent workers prefer being independent than working in traditional job structures. A survey by Morgan & Banks (cited in McGuire, 1998) estimated that, by 2010, 25% of Australians will be working from home. Of the 1800 people surveyed for the study, 63.4% said working from home increased their productivity and 54.1% reported improvement in their morale. Given the accelerating uptake of the Internet, which has facilitated networking, marketing, and the exchange of information in the global knowledge economy, it has never been easier to take an entrepreneurial approach to writing consulting. In this paper, I will present an overview of the theoretical principles and research findings that frame the work of a writing consultant, along with a discussion of the pragmatics of preparing to work as a consultant.

Consulting and Contracting

Ames (2002) explores differences between consultants and contractors in relation to the services offered, the skills and knowledge required, and the fees paid. The major difference between consulting and contracting is the legal status of the consultant: whether they are paid as an employee or as a vendor. The contractor generally works for a single client for so many hours a week for a certain hourly rate over an agreed-upon period (Rowell, 2005). The consultant, (independent/freelancer)—the literature treats the terms as exchangeable—generally works on a by-project basis, is regarded as one who gives advice, and usually works for multiple clients, either on an hourly rate or by the job (Rowell, 2005). In this paper, I focus on the concerns of the single consultant, but recognize that consulting is offered by corporations functioning on a global and

national scale, small and solo consultants (who may be academic practitioners), and corporate “internal” consultants.

Why Do Companies Hire Consultants?

Williams (2003) claims that most companies use contract labor to control costs, because 30-40% of payroll expenses are in benefits outside salary. Other benefits that he mentions include the capacity to recruit and screen potential employees without the risk of commitment, a reduction in training costs for specialized work, the ability to fill an unexpected need for some time-bound project or technical service, and the insulation of core employees from layoffs. Other reasons put forward by Kishel and Kishel (1996) include a lack of expertise or specialized knowledge within the company, a temporary personnel shortage, the need for an outsider’s objective viewpoint, the desire to capitalize on a consultant’s credibility, the desire to avoid “going through channels”, the desire to avoid conflict within the organization, the need to handle a crisis, the need for a “second opinion”, and sometimes even the desire to use up the consulting budget before the end of the financial year. In summary, companies hire consultants to help them work better, faster, and cheaper.

Why Do Individuals Become Consultants?

Rowell (2005) suggests that many do it to escape from the confines of corporate culture. McGuire (1998) agrees, seeing it as part of a “growing trend to get away from conventional desk jobs and claiming that “freelance consulting offers an attractive employment alternative for people whose prospects for advancement have been stifled by crowded corporate ladders”. He also claims that “there are considerable tax advantages in Australia for self-employed consultants with their own registered business”. Anderson and Kleine (1988) speak for many US academic colleagues of my acquaintance who belong to the Association of Business Communication and to the Association of Professional Communication Consultants when they state, “Our business is teaching writing, and we ordinarily conduct it in university classrooms . . . we are committed to academe, but we are also committed to consulting”. Academics do consulting work to link industry with the academy. My consulting work adds immeasurably to the value of the work done in my corporate writing and editing classroom and leads to opportunities to research workplace writing culture.

Models of Consulting

Dallimore and Souza (2002) describe consulting as a “research-based, instructionally oriented process”. They use the systematic method of investigating a broad range of organizational problems developed by Nyquist and Wulff, whose model involves a four-stage process:

- 1) Gather sufficient information on the problem/issue/question of interest to provide insights into what is occurring in a particular context—maybe via a communication audit that uses questionnaires, interviews, and/or onsite ethnographic observations (Hargie & Tourish, 2000).
- 2) Analyze the data for themes, patterns, consistencies, and inconsistencies.
- 3) Interpret the data to make sense of the themes and patterns in the organizational context.
- 4) Work with the client to formulate, articulate, and implement effective intervention strategies for change. These are sensible, practical steps for a consultant to follow.

Schein’s typology (1969) presents three models that describe different situations that generate the need for a consultant:

- 1) The purchase-of-expertise model (in cases where the client has neither the time nor the resources).
- 2) The doctor-patient model (in cases where the client needs to bring in an expert to diagnose problems and plan interventions).
- 3) The process-consultation model (in cases where the consultant carries out a process in the organization and the client monitors it).

Kitay and Wright base their typology of consulting roles on two dimensions:

- 1) The nature of the knowledge that consultants purport to use in their work and
- 2) The extent to which the boundaries between consultant and client are permeable.

They differentiate “esoteric” from technical knowledge, seeing esoteric knowledge as specialized knowledge inaccessible to the uninitiated and technical knowledge as a set of practices that may be complex and intellectually demanding, but open to anyone willing to put time and effort into learning

them. In their analysis of the consultant-client relationship, they differentiate between the insider and the outsider on questions of amount and closeness of interaction, period of interaction (short-term or long-term), terms of engagement (for example, a consultant may be on retainer fees), and warmth of personal bonds and social ties.

What are the Desirable Personal Characteristics and “Communicator Style” of an Effective Consultant?

In his influential book *Communicator Style*, Norton (1983) defines the concept of communicator style as the way “one verbally, nonverbally, and paraverbally interacts to signal how literal meaning should be taken, interpreted, filtered, or understood”. His nine dimensions of communicator style provide useful guidance for consultants to consider: animated, attentive, contentious, dominant, dramatic, friendly, impression leaving, open, and relaxed. In a study of the perceived teaching effectiveness of faculty that he completed with university students, Norton (1977) identified the communicator style variables that respondents identified as being most related to effective teaching:

1. Good communicator image. Seen as being a good communicator, easy to communicate with on a one-to-one basis.
2. Attentive. Suggesting that the person is empathic, tolerant, caring, and “other-oriented”.
3. Impression leaving. Centering around the way in which the teacher presents what they have selected to present to influence the students to remember the content or the teacher.
4. Relaxed. Perceived as being without annoying nervous mannerisms, relaxed, and comfortable.
5. Not dominant. Characterized as not being dominant nor “coming on too strong”.
6. Precise. Perceived as eliminating ambiguity in subject matter, and eliminating confusion about work expected.

Who would deny that these characteristics are desirable in an effective consultant? Other highly desirable personal qualities of consultants include self-awareness, confidence, lifelong intellectual curiosity, initiative, imagination, creativity, enthusiasm, energy, sound judgment, diligence, and commitment. Consultants also need to be well-organized and competent, engaging and entertaining. High ethical standards—respect for confidentiality of documents, former employees, competing clients—are crucial. As Holtz (1993) observes, “As a consultant, your image and reputation are among your greatest and most valuable assets. You must guard them carefully.” These personal qualities need to be accompanied by extensive knowledge and skills.

What Skills and Knowledge Does an Effective Consultant Require?

1. Analytical and critical ability to ask good questions, diagnose problems, and find solutions in collaboration with clients by focusing on the client’s expertise and the company’s goals.
2. Skills in listening carefully to quickly understand the client’s unique situation, and then relate the consultant’s experience to it—learning to speak their language in order to tailor a “bespoke” approach to their needs.
3. Skills in researching, interviewing, “considerate” networking (Frick, 2005), teamworking, facilitating, and negotiating. It is particularly valuable to be able to identify the negotiation skills of others (Putnis & Petelin, 1996).
4. Excellent oral communication and “pitching” skills.
5. Excellent writing skills for writing proposals (before a project) and research reports (after a project).
6. Ability to create credibility and build rapport with managers and employees.
7. Professionalism in all aspects from promotional and training materials (both on paper and online) to dress and demeanor.
8. Theoretical and applied knowledge of the basis of the consultant’s expertise: how words work, how usability testing works, etc. Deep and broad knowledge of the industry that the consultant is specializing in. A writing consultant needs an up-to-the-minute awareness of trends in the writing industry, for example, plain language initiatives, blogging, and podcasting.

9. Membership of professional associations such as the Society for Technical Communication (and its Special Interest Group Consulting and Independent Contracting), the Association of Professional Communication Consultants, the Society for the Advancement of Consulting, the Professional Association of Contract Employees, as well as community associations
10. Technical and technological expertise and knowledge, plus a strong commitment to keeping up with advances to cater for IT convergence and “new” writing-related services for the multimedia aspects of the Internet.
11. Understanding of organizational writing culture and the difficulties inherent in advocating change. Michaels (2005) suggests that a consultant “understand the hiring company’s ‘best practices’—the internal processes aimed at organizational efficiency” and ascertain whether there is any internal resistance because of “perceived threats to existing jobs”. Ames (2002) says you need to know “your business and their business”. Experience has taught me that a consultant’s credibility is enhanced by knowledge of an organization’s management and technical systems, processes, practices, and infrastructure.
12. Self-marketing savvy and promotional strategies. Clark (2004) and Holtz (1993) discuss the difference between what beginning consultants believe their marketing task is and what their marketing task should be. Clark advises would-be consultants to use marketing as a framework to think about issues, because marketing is client driven. She says that our economy is a service economy, so service, not sales marketing needs to be carried out.
13. Business, management, and financial acumen and skills. Hackos (1994) observes that “Quality happens as the result of a well-managed, well-organized process. Frick (2003) advises consultants to think of themselves as a business and to “Look like a business immediately”. She advocates an extensive business planning process that covers business operations such as choosing the appropriate legal form for your business (the 2000 independent contractor survey by the Society for Technical Communication revealed that 80% of the respondents chose sole proprietorship), finance, marketing (a business name not associated with your personal name provides better branding potential), technology, and networking, and incorporates documenting of all business procedures. Holtz (1993) provides guidance on business plans. Consultants should ask:
 - Where do I want to go?
 - How do I propose to get there?
 - What difficulties will I have to overcome?
 - What objectives do I need to establish and reach?
 - What do I do best?
 - What need do I meet?

Phases of Consulting

Setting up as a consultant

- As is useful in many situations, do a SWOT (strengths, weaknesses, opportunities, and threats) analysis.
- Explore your experiences. Inventory your competencies. Assess your aptitude (Biech, 2001).
- Define and research your market/service niche, the small segment that you’ll focus on. It is widely acknowledged that it is better to have a service niche than a market niche (Clark, 2004). You may need to make a trade-off between over-specialization and flexibility (Meyer, 2000).
- Analyze your competition.
- Write a mission statement that encapsulates what you have to offer. How do you differentiate yourself from other consultants? You need the right image to get the right clients, so have a branding exercise and do logo research with a graphic designer to help you decide on your brand essence. What problems do you address? Who are your clients? How do they benefit from your services?

- Ensure that you engage the services of an experienced legal practitioner for contracts and agreements, an accountant for tax advice and billing, and a technical expert for technological problems.

How do you find (and keep) clients?

Hynes and Roever (1999) argue that selling writing consulting services is best achieved through personal relationships. They suggest that beginning consultants engage in networking opportunities at every opportunity. Their strategies for finding clients include teaching college courses in writing; teaching public seminars; being a guest speaker at meetings; writing for newsletters, journals, and local papers; attending seminars and workshops; joining professional associations; asking satisfied clients for referrals and testimonials; collaborating with other consultants; subcontracting from larger firms; advertising, sending direct mail, and/or cold calling (but these last three are the least effective). Hynes and Roever say that their best referrals come from former students, colleagues, and publicity (not commercial advertising). Another strategy is to contact a recruiting agency that specializes in finding freelancers. The Society for Technical Communication (STC) has a job board. Maintaining a solid network is essential. Those in your network can help you solve problems, can provide leads to new clients, can give you work, can do work that you hand on to them if you become over-committed, and can provide company to replace the “water-cooler” social network. Reporting on a recent STC survey, Poe (2002) revealed that 59% of technical communication consultants work out of home, 36% work out of their client’s site, and 5% work out of rented premises.

A proposal is the key document for winning consulting jobs.

What goes into the proposal?

If you are responding to a Request for Proposal or Invitation to Tender, you will need to comply rigidly with the guidelines. However, proposals generally contain the following sections, so it is worth creating a template:

- Background, in which you re-state how the client has described the current situation in your original briefing meeting. Diagnosis and feedback via a training needs assessment/communication audit (which involves an analysis of current processes and products)
- Scope, in which you describe what you will do—your planned intervention and implementation. Highlight your hands-on experience and how you’ll customize your approach for their needs.
- “Deliverables”, in which you list the tangible items that you will deliver. Deliverables include products such as plans, reports, strategic advice, designs, training materials, storyboards, specifications, and prototypes.
- Track record—list of previous clients and projects. What Return on Investment (ROI) you have returned to previous clients (Redish & Ramey, 1995).
- Personnel, in which you list your qualifications (and those of anyone working with you on the project).
- Timeline, including any milestones and the finish date.
- Fees, terms of payment, and details of any other potential charges. Find out what the going rates are, work out how much you need to earn each year and charge accordingly. Poe (2002) reports that a recent STC survey revealed that 83% of those surveyed charge an hourly rate, presumably to avoid the “scope creep” of a fixed fee. How you are paid depends on whether you bill your clients directly or use a third party such as a broker/recruiter.

Completing the project

Once your proposal is accepted, clarify your understanding of the project, your client’s expectations for the project, the logistics, the roles and responsibilities of everyone involved. Develop a timeline/Gantt chart/project-tracking benchmarks/weekly meeting/status report schedule/worklogs,

documenting any obstacles before you start. Michaels (2005) warns against over-promising and under-delivering. How should you present your evaluation to management? Usually in the form of a report. Writing consultants from academic backgrounds usually include research issues that they have uncovered. When you have finished the project, it is always important to follow up with a de-briefing session to discuss improvements to the process for subsequent projects, to help the company maintain their momentum and enhance future processes by fine-tuning the strategies, if necessary. It is also important to institutionalize the intervention, if possible, to fix the changes in place.

Conclusion

As Goodman (2004) reports, "Writing is still the core skill for Corporate Communication. The Internet has underscored that writing of the highest order is still the major talent of those who create and send the messages in and from our major corporations". Industries based on information and communication technologies are predicted to remain areas of growth employment in the coming decades and they will need the help of writing consultants, who can confidentially look forward to many more opportunities for work.

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