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DAVID FIELDS INVITES YOU TO HIS SOLO PRACTICE ACCELERATOR

EPISODE 182

- Will: Hello, David. Welcome back to the show.
- David: Hey, Will. I always love being here. I love Unleashed, and I appreciate the opportunity to be on it with you again.
- Will: Thank you very much. For listeners who haven't heard the previous episodes with David, he's been a fabulous guest before on the show. In fact, episode number one of Unleashed, David was the guest. He did recent episodes on how to make outbound calls and how to use a CRM system. So check out those episodes.
- Will: So David, you are a coach to independent consultants in boutique firms. You're the author of one of my favorite books, *The Irresistible Consultant's Guide to Winning Clients*. I know that you have an upcoming event that I thought a lot of my listeners might be interested to hear about. I'm curious to hear about it. It's called the [Solo Practice Accelerator](#) on August 18th and 19th, 2019 in San Francisco. Could you just give me the overview of this Solo Practice Accelerator event coming up?
- David: Sure. I'd love to and appreciate you asking. As you know, Will, this event, this Solo Practice Accelerator, actually grew out of the work you and I did together for your folks at Umbrex. We created these series of two-day events, each one, I think, getting better. After learning what's most helpful to folks, we've now taken that and created this Solo Practice Accelerator, which is two days.
- David: It's designed for, really, as it says, people who are in a solo practice. We've used all of the best content that you and I learned together, that really helps people, that has an impact. It allows them to walk away in a better place than

they came in. Everything else we discarded. So it's super high impact, really practical couple days for solo consultants.

Will: That's fantastic. So let's talk about who should come to this and who you're targeting. Then let's walk through the agenda, what you're going to cover.

David: Sure. Well, as it sounds, it's for solo consultants. We seem to usually get one or two folks there who have a one or two-person firm or three-person firm. So I don't say, "No, you can't come," but really, it's designed for the consultant who's on his own or on her own.

David: We tend to get a pretty good mix of total newbies, folks who are... We had one at our last session, someone who hadn't even started their practice yet, was still in industry but knew they were leaving and wanted to start off right. I have a lot of respect for someone who will do that. So, people who are truly brand new, and we've had people who've been consulting for 30 years come. The funny thing is, the most common response or final statement from people who've been in consulting for a long time when they go to one of these is, "Man, I wish I had done this when I'd started."

David: Whether you're new or been doing it for 5 years, 10 years, 15 years, you might get something a little different out of it. You can get more nuanced or more sophisticated wins from it. As long as you've got a solo practice, you're going to find this to be pretty extraordinary.

Will: Fantastic. So walk me through, big picture, what are the major topic areas. Then we can dive in a bit further deeper into them.

David: Sure. It's really built around a pretty simple model of consulting. I think the consulting business is very simple anyway. Really, the core of consulting is you just need to win clients, you need to win engagements, and deliver value. I mean, that's what we do. We win projects. We deliver value on those projects. We need to keep that cycle spinning.

David: Now, part of keeping that cycle spinning is having some sort of infrastructure beneath it, which just helps you win more projects and create value. You take those and a bit of strategy, and you have yourself a consulting practice. So what we do over the couple of days is we actually look at each one of those and equip the consultants to walk out in much better shape on every single one.

David: Now, we do focus more where consultants tend to need more help. So most solo consultants need help on winning engagements: "How do I find more clients?" We spend a lot of our time really equipping people to win more

engagements, to attract more clients, to close more clients, at the same time be able to do it in a way that allows them to handle all that business but still deliver quality and not drive themselves crazy, not run themselves ragged. Really, what we want is a practice that's more lucrative, but also more fun.

David: As you know, I'm about to head off to Portugal in just about a week and a half here and spend a month there. That's the kind of practice you want. You want a practice that's lucrative, exciting, and fun, but also gives you the ability to take a month off if you want to take a month off.

Will: That is awesome. And I know you went to Italy last year for a month, so I love this take a month off every year approach you have.

Will: Let's talk about each of those four areas in turn. Win engagements, definitely, I'd vouch for that, what most people are looking for maybe help on. What are the, maybe, exercises or topic areas that you cover? Give us a flavor of what we'd experience at your Accelerator.

David: Well, we'll hit the key elements of impact. Impact, as you know, is step two of my six steps. It is actually the most critical step. It's having the ability, when you talk with a prospect or even a non-prospect, to have them know instantly what you do in a way that's compelling. That ends up boiling down to a fishing line. So what are those handful of words that capture who your target is and what problem you solve for them?

David: Many, many consultants... as a matter of fact, even boutique firms... have a very hard time with this. Building a very compelling fishing line is much more difficult than it appears. So we work on that, but not only do we work on that. We do the critical, critical task of practicing it.

David: You know, there's this round-robin exercise, which you've participated in, where, after we work on the fishing line... you get a chance to develop it... you stand across from someone else and you deliver it and see how they react. They give you feedback, you take notes, and you deliver it again. Then you rotate to somebody else, and you get to deliver it again. You're giving feedback also.

David: So, in a short period of time, you make vast leaps and huge improvements in your fishing line, which otherwise, outside of this program, probably takes 6 months, 12 months, or 18 months. We do it in a short period of time because it's so intensive. So that's one example.

Will: And we talked about fishing line in episode one. Just give us a couple examples. It's sort of, "I work with this particular audience on this type of

problem or who aspire to do this," right? Give us a couple examples of fishing lines.

David: Sure. So I'll give you a couple examples of good fishing lines, one with a consultant whom I worked with who is in Australia. Eventually, after a lot of effort, we realized her fishing line was, "I work with IT companies that are underperforming in the Asia Pacific region." Beautiful.

David: IT companies is a little broad, but it's still... it gets narrowed down because their problem is they're underperforming in Asia Pacific. They instantly know who they are. They know whether they're underperforming or not. Even if they're not, if they run into somebody else who is, her fishing line is so tight, it was easy to repeat.

Will: Hm, yeah.

David: Yeah, go on.

Will: Yeah, I like that because it's memorable enough that you're going to recall that person six months later. It's saying it's an IT company and they do have operations in Asia Pacific, but it's underperforming there. So if you meet someone who runs an IT company that is global, but they're not doing as well in China and Japan as they'd like to be, you might think of that person.

David: Exactly right. I'll give you one more example. These always sound good, and you're like, "Oh, well that's easy." What's missing is the 6 to 12 to 18 months it took us to build it.

David: Another consultant... This one's actually in the east coast of the US. Where his fishing line ended up was, "I work with luxury e-commerce sites that are doing well but know they could crush it." So again, really clear articulation of a narrow target: luxury e-commerce sites. In this case, he wanted to make sure that he wasn't getting people who were on their way down. He wanted sites that were on their way up and realized they could be even higher.

David: Again, if you're not a luxury e-commerce site, you'd say, "Okay, well that's not me, but I don't know, could you help me?" Then he could take the business opportunistically. As people ran into colleagues who were selling Movado watches online kind of thing... as long as it was big because he worked with bigger sites... they'd say, "You know, you ought to work with this group out of Philadelphia"-

Will: Got it.

- David: ... because"... right. So that's an example of a fishing line.
- Will: All right. Cool. So one session around winning engagements would help you develop your fishing line so you can communicate your impact.
- David: Right.
- Will: Great. Okay. What's another session in the winning engagements?
- David: Well, in the winning engagements, we also do outreach. You mentioned we just had a podcast, or interview, a talk about outreach, which is great. It's great to read about it. It's great to listen to it.
- David: It's quite another thing to actually practice it, to be in a situation where you are on the phone, or you feel that pressure, or you're networking with someone and being able to have that conversation. So I give people the ability to create scripts. I give some examples of what a good script will be, not so that you read it like a robot, but so that you're prepared.
- David: Then we give people the opportunity to actually practice, which is amazing because as you know, Will, do something once, you're okay at it. If you've practiced it and then go to do it, you're at a whole other level. So then, not during the two days we're in the Solo Practice Accelerator, but the next day, the day after, the week after, and the month after, people are already prepared, that much more confident. They know what they're going to say. It comes more fluidly. You've already worked out your kinks and mistakes. So that's another session inside winning engagements.
- Will: I'll vouch that, when I went through that session that you led at the event that we did together, it was new material for me. I was not confident at all and did not feel comfortable making outbound calls: what am I going to say? So that gave me a lot more confidence to make an outbound call.
- Will: You walked us through, how do you leave a voice mail, what's the agenda for the call, and what if people say they're busy? What if people bring up an opportunity? You taught us the term, which we went over in that episode on outbound calls.
- Will: It's one thing to even listen to the episode or read it in your book, but that's one where practicing it in person with other people is super, super valuable. Okay, cool, so outbound calls. What's next on the winning engagements agenda?

David: You want to keep going through winning engagements?

Will: Yeah, let's finish it up.

David: That's fine because we do a lot around winning engagements. We work on visibility building. I like people to walk out with a plan, so not thinking of it in hypothetical terms, but, "What specifically am I going to do to create visibility?", down to and including something... I don't remember whether we did in one of the Umbrex sessions or not... but we actually build killer content.

David: Again, rather than keeping it at a hypothetical level, if you're going to do a speech, or you write out what you're going to speak, or if you're going to write a white paper or whatever, what will it be about? What is going to be that killer title, which is half the battle in content. Is it attracting people enough to actually pick it up to read it?

David: So we have a session where we go through and we define that. Again, you're walking away, not just with a vague idea, but, "Here's the marketing I'm going to do," down to, "I'm going to deliver a speech that says differentiation destroys consulting firms." Ooh, that would be pretty provocative.

Will: So, for anyone listening, whether they're going to come to your session or not, it's important to think about building a visibility plan of, not just tackling it one-off: "What white paper am I going to write next, or what blog post will I do next?" You're suggesting we think about an overall cohesive plan of, "What medium am I going to use? Am I going to do a podcast? A blog? White papers? Am I going to try to appear in other people's podcasts? Am I going to write a book?" Don't recommend that. "Magazine articles? Try to give speeches?"

Will: So come up with the media and then come up with some topic areas. You even help come up with headlines. So that's something anybody could sit down and say, "Let me do this for my practice of what's my plan for the year," right?

David: Absolutely. Anyone can... You go back to the five marketing musts. Really familiarize yourself with the five marketing musts... writing, speaking, networking, trade associations, and digital presence... and say, "Which one of those works for me? Which of those is going to work in my market? Which of those will I do?"

David: I'm often asked, "What marketing vehicle should I choose?" My answer is always, "The one you should do is the one you will do. It makes little sense for me to tell you to get on stage if you're frightened out of your wits and won't do it. So you've got to start with what you will do."

- David: So go back to that, and then make it real for yourself rather than letting it be scattershot and happenstance. If you want to build a practice that attracts clients regularly, you have to market regularly. So create the plan.
- Will: Yeah. I mean, my two cents on that is come up with something... building on your point about regularly... pick something that you can actually commit to doing on some regular basis, whether it's weekly, monthly, or twice a month. Knowing that that hole is out there that you've got to fill, I believe makes you more observant than if you only are going to write something when inspiration strikes. It just gets you in the habit of creating content.
- David: Yeah. I mean, you do an amazing job with these podcasts. I'm sure part of it is the podcasts have helped you do the amazing job, the fact that you had to put this together. You've committed to it.
- Will: Well, I saw some advice that, to get good at podcasting, you should do a couple hundred episodes. So at some point, maybe that will start to convert.
- Will: All right, but let's get back to winning engagement. So we've got impact, which is fishing line, outreach, visibility... any other sessions in how to win engagements?
- David: Those are the heart of it. We talk about the turn. We work a bit on the turn. Really, for anyone, you need to figure out, for your pipeline or your path from marketing through to actually closing projects, where are you struggling? Fortunately, at the session, we have an opportunity to handle whatever comes up.
- David: So if someone says, "What do I do if I get a price objection?", well, great: we can talk about that. We can talk a bit about how to set fees. We can talk about the fee structures, which you just did a thing on. Anything... and that's true across all four of the areas of building a consulting firm... we do get an opportunity to cover whatever's needed by the small group in the room.
- David: It's a small group. We're working together. We basically work as a team. It's like you're in a room with a whole bunch of partners who are all interested in helping you grow your firm. It's like, my gosh, what better environment could you have?
- Will: How many attendees typically come to your event?
- David: We keep it typically under 25.

Will: Oh, okay. So really, really intimate. You can have interactive exercises.

David: Yeah, it is. It's a size that allows me to have personal interaction with everyone. People have interaction with each other without it getting crazy.

Will: Awesome. Creating value: I guess that's around really delivering the engagement or the execution of the work.

David: Yep.

Will: Any topics on that?

David: Sure. Again, just helping listeners whether they come or not, one topic which I've found to be particularly helpful for solo consultants in creating value is to think through the client experience. Value is partly the results you deliver, but just as much of the value you create for your clients is determined by the experience you give them.

David: So we walk through the phases of the client experience, everywhere from pursuit to onboarding to the actual project execution, but also wrap-up and post-project. In execution, we usually talk about what to do if things go wrong. So at each point of the client experience, there's enormous opportunity to improve what you deliver. That's true of every single firm, mine included. It's a constant, constant upgrading challenge.

David: So what we do there, we walk through and I say, "Here's a whole bunch of practices." Other people in the room sometimes say, "Here's what I do. I always do a pizza dinner with my clients the first week." Okay, great.

David: We get all of those examples, and then there's an opportunity... we have checklists and worksheets for all of this... to say, "Great. Here's my ideas for what I want to do to improve my client experience, what I actually will do and what I will do over the next 12 months, which might be two, three, or four things that we actually implement." Those two, three, or four things will have a huge impact on how your clients perceive you and the value that's provided.

David: The idea is... and everybody gets these, but there's nothing better. I happened to get just the other day, Will, a letter in the mail from the CEO of a company that's one of my clients. We did this insane project, a couple of weeks. It was very high dollar value. The CEO sent me a handwritten letter saying, "So grateful for the work you did and that you work with our company." Now, how amazing is it to get a letter like that from the CEO of your client?

Will: It's pretty good.

David: Right. I mean, it's amazing. That's the ideal for any of us. The reason that happens is because we focus on creating client experience, not just good results. We deliver good results but also the entire package.

David: So this is what we give people the ability to do. Whether you come or not, again, you have the ability to focus on your client experience and upgrade it.

Will: That's awesome. You know that I was really inspired by those sessions that you led. I did a little miniseries on Unleashed, episodes 128 through 133 I think, on those different aspects of the client experience, which I found was a really helpful way of thinking about it and coming up with very discreet things that we can do. So it's not accidental that experience is good. You have a checklist for sending out a handwritten note at the end, or following up one month afterwards, and that those things get on your calendar so that they get done.

David: Right. And if you're really bad at processes like me, then you need a bit of team, perhaps, to help you.

Will: That leads us to infrastructure, I think.

David: It does. It leads to infrastructure.

Will: All right. So infrastructure topic. Tell us a bit about that.

David: It does. Infrastructure really is about, of course, setting yourself up to be able to deliver all this client experience and deliver all this extra work you're going to win while enjoying your business more.

David: So we cover a couple things. One big piece of it is the team. Who should be on your team? What's the right team to assemble? If you're a solo consultant, for instance, what does your team look like? Again, I would give that thought whether or not you're coming to the session: "What kind of team enables me to deliver the client experience, to work better as an individual?"

David: As you know, some of the pieces I teach really are around letting you leverage what you're good at and having other people do the parts they're good at that you're not so good at. So what is the right team and who should be on it? How do you actually assemble that team? That's one part of it.

David: Then the other part of infrastructure where we spend a bit of time is around systems: why to use them, how to use them, what you should systemize,

which is pretty much everything you do more than once. Where do you actually build them?

David: Again, just like everything else, rather than leaving this at a hypothetical or theoretical level, we actually go through and say, "Okay, what are the things that you're doing multiple times? Which task, if you systemized it, would create the biggest gain for you?"

David: We have a process for then taking that from being this vague idea to, here's the system. Here are the pieces. Here's who's going to do it, when they're going to do it, and how it works.

Will: Give me an example of a system.

David: My little group here, we have probably 25 or 30 systems, anything from... The client experience is a system. When a new client signs on... We had a new client sign on on Monday from Poland, which is pretty awesome. So we have a whole system set up so I don't have to worry about, "Oh, is everything being taken care of?", and waste a whole lot of time setting up for a new client to have a good experience.

David: Instead, this combination of having the right people and the systems in place, I just tell everybody, "New client. Here's who they are. Here's what information I have." My team, most of whom are not full-time... they're contractors or part-time... but everybody knows they can go into the system and say, "Okay, I'm supposed to find a place that can send a box of chocolates to Poland," in this case. I can only imagine, if I were responsible for doing that, it would never happen.

David: I have someone who knows they're supposed to do that because it's written in the system. They know, when that box of chocolates goes out, what the note is supposed to say. I don't have to think about it again and write it again because it's in there. It's part of the system. I don't have to worry about scheduling the interviews. That's already built into the system. We know that we need contact information for all the key players. They happen to be in Poland, so we also knew to ask... because it's built in there... how do you pronounce their names?

David: All this stuff you remember one time or you learn one time, you want to bring those best practices forward. That's an example of a system. It's all completely built out. We have that for kicking off clients, which happens to be top of mind to me.

- David: We have systems for as simple as how do you manage the end of your day? My assistant calls me the end of every day. She has a checklist of things to walk through with me that will make me more efficient and more productive tomorrow.
- Will: That's genius.
- David: It happens for every tomorrow.
- Will: What's on that checklist? That's a good checklist [inaudible 00:25:08].
- David: I'd have to ask her what's on her checklist. That's her job to keep track of her checklist. I know what some of the things are. We start every conversation with, "Tell me something positive." We always frame every conversation with something positive.
- David: We will go through Redbooth. Redbooth is our project management system. So, of all the things I was supposed to get done, did I get them done? What's coming up tomorrow? What has to be prioritized tomorrow?
- David: We go through Pipedrive, which is our CRM. "Who did you talk to? Did anything move forward? What happened with this person? You had a call with that person. You had a call with Will. Is there a next step on that? Is there something that we need to take care of?"
- David: She has a couple other things, but I don't remember them off the top of my head. That's why she has a checklist.
- Will: That's why she has a checklist. Awesome.
- David: Thanks.
- Will: That sounds like a great practice. Okay, cool. So you help think about who's on your team, and this is not just subcontractors, but is also people like your support team, like your administration person, your process person.
- David: Well, do you need an attorney? Do you need an accountant? If so, let's make note of that and get those people identified. What about a videographer? What about people just to help you make your practice run smoother?
- David: Will, there are even people that you may have sort of thought of, but I like it formalized. Who are your cheerleaders? You need a couple cheerleaders, especially as a solo consultant because a solo consultant's world can get pretty lonely. Nobody wins every project. You get rejected. You can feel

down. So who's your support system, not just from a business standpoint, but from an emotional standpoint?

David: That's all there. There's a little slot for it to write in that person, and if there's a blank there, well at least you know you need to go fill in that blank.

Will: Awesome. Yeah, I hadn't thought about a cheerleader. I'm going to have to go find one. I've got my significant other, of course. But that's a good idea. Get a couple more people to just call you up and say, "Hey, how are things going? Let me give you something positive, and you will be successful."

Will: Okay. And strategy. Talked about strategy as well. What does strategy mean in your world for a consulting firm?

David: Well, especially for a solo consultant, a solo consultant needs to decide where they're trying to go. What's the intention here? So we spend a bit of time really laying out what are the possibilities. You can be a freelancer. You can be sort of a single shingle consultant, and those are different. There's a difference in who's winning the work. Are you winning the work, or is someone winning the work and just handing it to you? You could be on the path to building a boutique.

David: They're all different options, and those options have different implications. If you're going to think about your business strategically, you need to know what it is you're building, what it is you're trying to do.

David: For many years after I formed Ascendant Consulting... I co-founded it... I wanted no staff. I had already been a partner at a firm. I've already had staff. I've already been in corporate and done all of that. I just didn't want staff. So that's great. That helped me frame the type of firm I was trying to build. My firm has changed a bit, and now we're staffing up again, but I got my break from having children, as it were. Now it's more like grandchildren.

David: So a lot of strategy is understanding what are you not going to be. What are you going to say no to? What type of firm are you trying to build, and what type of firm are you trying not to build?

David: Really importantly, rather than saying that from a, again, loose standpoint, having a framework, understanding what are the implications. What are the implications for your daily work? What are the implications financially? What are the implications in terms of who you need to bring on and when? How does that intersect with your overall goals as a person?

David: As you know, I'm much more interested in the people than the firms. Whenever I work with a firm, and I work with a lot of boutiques, I tell the owners that. "I want to help you build your firm, but to be clear, I'm much more interested in having you be a person that's being served by your firm, that's achieving your goals. So if you're trying to spend more time in the community or you're trying to spend more time with your family, let's build a firm that allows you to do that."

David: So the strategy... and again, especially for a solo firm, though to be fair, I do this with boutiques also... the strategy of your firm has to fit in with your personal strategy, with where you're trying to go as a person, as a human in a broader context. We spend some time giving that thought.

Will: That's fantastic. So you've got the next one coming up August 18th to 19th, 2019 in San Francisco.

David: Yes.

Will: This show is, I hope, kind of an evergreen content kind of show, so some people may be listening to this in our future after August. Are you... to people who want to... or maybe they don't live in San Francisco and they can't come to that one... For people who want to get informed of future ones, if people subscribe to your blog, if they've signed up to that, will they get notified of upcoming events?

David: Yes.

Will: All right.

David: Yes. First of all, you should fly in. People fly in from all over. At the last one we did in New York, we had someone fly up from Colombia. We had people from the west coast. So I would say flying in. It's worth it.

David: That said, if you can't make those dates, then once it's closed... and these things close pretty quickly... we have a wait list, and you can sign up for the wait list. Or just get my weekly announcement of the articles, and then I announce when the next one is.

Will: All right, cool. So if you just Google David A. Field's blog, your blog comes up?

David: Yeah.

Will: You can subscribe to that, which I recommend anyways. It's the first thing I read every Wednesday morning and love the blog. Subscribers to that will get

informed of when your next event is coming up, and I hope you do more of these.

Will: For listeners of the show, any special offers or bonus features that they might get if they sign up? What can I twist your arm into for listeners of the show?

David: So, if you're a listener of Will's Unleashed, you've got to really appreciate Will negotiating on your behalf here.

David: So sure. Here's what I'll do. Anyone who comes to Solo Practice Accelerator, signs up, you just tell me that you came through Unleashed, that you've listened to... you're a friend of Will. In addition to having this group experience, I'll give you a one-hour one-on-one phone call direct with me, which by the way, is not something that gets offered. I don't think I've ever offered that before. So this is unique. Don't share it with non-listeners. So you'll have a one-hour direct... We'll work on your business issues and help you make one-on-one progress.

Will: That would be awesome. Thank you for that, David. You heard it, David. Thank you very much. I will include the link to the [Solo Practice Accelerator](#) in the show notes, so people have it there. David, thanks for joining and telling us about what you've got coming up.

David: Well, thank you for inviting me, Will. It is always a delight talking with you.