

HOW TO HOLD TO HOLD A SUCCESSFUL IEEE CONSULTANT'S WORKSHOP

INTRODUCTION

Because of the increasing interest of IEEE engineers in consulting as a career, the Alliance for IEEE Consulting Networks (AICN) has, since 1996, assisted about a half dozen U.S.A Consultant's Networks (CN) with organizing a *Consultant's Workshop*. The primary purpose of these workshops has been to educate and train engineers in the field of consulting.

Layoffs, downsizing and the use of temporary help by American industry has resulted in many well qualified engineers looking for work and finding no permanent employment. But there are many agencies willing to broker their services as temporary employees. On reflection, many engineers feel they could do better by themselves as independent consultants. In either case, most engineers who consider consulting would like to know how to be their own boss, find their own clients and run their own business. These AICN workshops provide help.

Most IEEE engineers, it is assumed, have a degree from an accredited university, and if you are considering consulting, you have a niche or specialty in mind consistent with your education and experience. What you lack is assurance that you qualify, and how to achieve success. The successful consultant makes most if not all of his living income as a consultant. And, he does this by being *in business*. It is a realization that no employer is going to take care of you. You must do it yourself.

Being *in business* is quite different from being an engineer. Most engineers keep hearing from the IEEE as well as, by neglect, from their employer, that they must take care of themselves and that they must have several careers in mind. Consulting is such a career, but it is also a business and most engineers have only a fuzzy idea about how to find clients, close a sale, keep books, write invoices, pay the taxes and send Christmas cards . . . much less clean the floor and pay the bills.

WORKSHOP ORGANIZATION

The workshop should be organized with the needs of local consultants in mind. As implied above, there are at least three kinds of consultants, namely:

- (1) *Hot Skill Artist*: Engineers with at least one hot skill, but no interest in

finding clients or being in business. These engineers will be drawn to employment agencies for whom they will work as agency clients demand.

(2) *Technical Entrepreneur*: Engineers with excellent technical training and experience, but no skills in finding or retaining clients. These engineers may either go with an agency or try themselves.

(3) *Professional Consultant*: Engineers with excellent technical training and experience who have business skills including good relations with many past business associates, students, vendors and ex-customers. Such engineers can be active, successful, independent consultants within a month after an announcement.

All three categories of consultants, including those who are just thinking, will find great interest in attending a workshop for consultants.

The *consultant's workshops* have evolved into a training seminar for consultants. The main objective is to teach them the business skills they will need for success. It is assumed that technical skills exist and will be enhanced as required through experience and other IEEE publications in their fields of expertise.

Seminars on the following skills, listed in order, have been popular and represent the perceived needs of IEEE consultants:

- Marketing*
- Personal Skills*
- How to be a Consultant*
- Contracts*
- About Associated Organizations*
- Business Planning*
- General Interest*
- Moonlighting*
- Accounting & Taxes*
- Sales*
- Networking*
- Role playing*
- Workshops*
- Intellectual Property*
- Employment Contractors*

WORKSHOP TIME

To be very effective, the workshop must be planned as an all-day affair. From say 9am through 4pm. It takes this long to cover the subjects thoroughly enough so that the attendees have a substantive learning experience. The speakers must be aware of their responsibility in this experience. There are usually a

minimum of four presentations divided more or less equally in time: two before lunch and two after with an opportunity for a networking break after each presentation. If the presentations are shorter than one hour, more presentations than four in the day might be planned. Anything shorter than one-half hour is suspect for lack of content. Of course, if there is interest, two tracks can be planned with twice as many presentations requiring twice the meeting space. Often, with two tracks, all participants are brought together for a short keynote speech, and again at the end of the day for a wrap-up.

It is expected that attendees will have something to take home such as lessons learned .in the form of a bound book of notes furnished by each speaker. It is important that these notes be comprehensive and of good quality for later reference. These complete Workshop Notes should be given to each attendee at registration time the day of the workshop. The Workshop Notes should also contain information about the sponsoring Consultants' Network, membership requirements, meeting dates, etc.

WORKSHOP PREPARATION

The first thing an active IEEE Consultants' Network (CN) needs to do is decide if a successful workshop is probable. With a history of well attended meetings, and a large prospective audience of say 500 engineers who would be interested, the probability is good.

The next thing is a sufficiently large group of engineers who can devote time and effort toward planning, organizing and operation. The following list of tasks is given for reference:

- (1) Workshop Chairperson
- (2) Speakers & Presenters
- (3) Publicity
- (4) Site Selection
- (5) Treasurer
- (6) Event Operation
- (7) Publications

If the timing of the workshop can be coordinated with another IEEE activity likely to enhance both, then this should be seriously considered even if it is in the dead of winter. About six months should be allowed for planning and preparation of a one-day workshop. Activity must be slow and deliberate until a few days before the workshop when it will be frenetic.

WORKSHOP RESPONSIBILITIES

Workshop Chairperson:

Every organized activity needs a leader. Practically any of the persons seriously

interested in a successful workshop could be the leader, but the chairperson must have sufficient time and more motivation than most. The chairperson must call meetings and insist on attendance for assigning responsibilities to the workshop committee. He/she must make sure all responsibilities are covered through out the six-month preparation period. This will assure that the frenetic activity toward the end will simply be observed.

Speakers and Presenters

The theme of the workshop must be carefully chosen to represent the interests of a majority of the targeted audience. From the list above, *marketing* seems to be of universal interest. Whatever theme is used, four to eight good speakers must be found. The speakers should be motivational, even charismatic if possible, but they must be competent and have something important to say. Finding good presenters may be the most important job of the Chairperson.

A typical problem with finding speakers is lack of funds. There are many good speakers available, but even paying their expenses may turn the workshop into a financial loss. So, most workshops are faced with finding local speakers at no charge. Fortunately the opportunity to appear before a group of consultants is very interesting to business consultants, law firms, accountants, management consultants, and professional motivators, who see an opening for future paying business. Often there is a cadre of very successful consultants locally available who would be pleased to explain the secrets of success.

Publicity

Persuasion is the only way to acquire an audience for a workshop. A good and timely program is required, but clearly they need to know about it. Publicity is an expensive art form that is unknown to most engineers, but a very necessary part of any successful workshop. If any of the workshop committee has access to advertising expertise and their connections, that is clearly the best advice.

Probably the best place to turn for potential attendees is the local IEEE Section which must maintain a mailing list of all local IEEE members. Use of the mailing list to send brochures or notice of the workshop is highly recommended. Other organizations such as the ACM, Professional Engineering Society, programming groups and the like represent additional possibilities for mailing lists or newsletters for publicity. Advertisements in the local news paper are not recommended because of expense and lack of an interested audience. E-mail lists are always to be preferred because they are less expensive to use.

Besides a good program and good speakers it should always be emphasized that space is limited.

Site Selection

There are many conflicting objectives of site selection which must be carefully weighed. The site must be centrally located in a good environment; serve a good

lunch; serve good coffee at breaks; have a well appointed spacious meeting room preferably with desks; provide the necessary speaker aids; provide good logistic support; provide good parking space; and all at a very low cost.

All this calls for an extensive search, many visits, and consideration by the full committee. Site cost is probably the highest cost of the workshop and a very important consideration for the overall success of the workshop. Because of the modern automobile and adjustment to larger commute distances, a not-so-centrally located hotel or motel offers much less expensive accommodations.

Treasurer

Because of the possibility a workshop could result in the financial ruin of a Consultants' Network, keeping track of the funds is a necessity. Again, conflicting objectives must be reckoned with. Attendees must be asked to pay as little as possible to improve attendance, but be provided the very best speakers and accommodations. A typical good workshop budget for the committee is illustrated below using Gary Blank's formula:

Fixed expenses:	
Printing 3800 announcements	\$950
Announcement mailing postage	475
Out-of-town speaker (travel/hotel).	<u>700</u>
Total fixed expenses	2125
Variable expenses:	
Workshop attendee books (each).	7.50
Lunch (each)	<u>21.00</u>
Total variable expenses	28.5 each
Income:	
Let n = number of attendees	
Average attendee charge = \$89	
Income = 89n	
Profit to CN:	
Profit = 89n - 2125 - 28.5n	
Break even (profit = 0) n = 35 attendees.	

Using these typical numbers, a minimum attendance of 35 is required. This kind of calculation provides a good estimate for the budget of a successful workshop. If an out-of-town speaker is not necessary, then a considerable saving can be realized. The above mailing expense takes advantage of the local IEEE Section mailing facility to about 3800 IEEE members. Site cost is limited to the lunch cost because of negotiations with the hotel. A guarantee of at least forty attendees for lunch was agreed. Otherwise, room and set-up costs could be added.

One can see that besides doing a good deed, the workshop can be very

profitable for the Consultants' Network if the minimum break-even attendance is exceeded and there is ample space. The average charge per attendee of \$89 was arrived at by averaging the expected attendance at the early registration date of \$79 and late registration of non-members at \$109. Early registrants provide an early warning of low attendance and financial trouble. There are many variables in this equation of a financially successful workshop. Because many of the variables are best estimates the outcome is always in some doubt which makes every workshop an exciting adventure.

Event Operation

The workshop event is a real project with deadlines, start dates, coordination and personnel problems. Contingency and fall-back plans must be made: for example if the site is not half "signed-up" by two weeks before the event. Who will foot the bill for a half-empty meeting room? An example of a schedule is given below:

6 Months Before the Event (BE) - Begin organizing the workshop committee. Start with naming or appointing ten persons for the responsibilities listed above expecting three to drop out early leaving a seven member working committee. Of course, fewer committee members means doubling up on responsibilities and jobs to the point it might become unfeasible to hold a workshop.

5 Months BE - A committee chairperson must be chosen. Committee members should be assigned their responsibilities and agree to follow through. Speaker selection should begin. The Treasurer should prepare a budget and a search begun for a site..

4 Months BE - At least half the speakers should be selected and accept the workshop objectives. The budget should be approved by the committee. Site visits should be completed and a site recommendation made.

3 Months BE - Negotiations should begin for acquisition and use of mailing lists, publicity planning. Site selection, lunch arrangements and meeting space should be confirmed by the hotel or facility. Speaker selection should be complete and confirmed.

2 Months BE - Remind speakers their notes are needed in preparation for the Workshop Notes publication. Agree on publicity to advertise the workshop and begin detailed arrangements for implementation.

1 Month BE - At this point, all activities should be on schedule. Followup is necessary to reassure that everything is under control. Duties and responsibilities should be assigned to committee members for activities on the day of the event. This includes signs, registration, provision for payment, records of pre-paid attendees, badges, speaker aids, screens,

chart/chalk boards, PA system, projection system, room arrangement.
Check to make sure publicity arrangements have been completed.

3 Weeks BE - Collect speaker notes and complete detailed plans for publication of Workshop Notes. Check on publicity.

2 Weeks BE - Reconfirm speakers and site preparation. Begin coping with delays, cancellations and changes of plans.

1 Week BE - Final committee meeting to confirm plans and to cope with changes. Confirm day of event responsibilities

Publications

Two major publications must be prepared and distributed on the day of the event; the Workshop Brochure and the Workshop Notes. First, of course, is the brochure that describes the workshop. This may have been prepared, at least in part, as publicity material mailed to potential participants. The workshop description must have a detailed time schedule of events including speaker presentations, breaks, lunch and adjournment. Speaker biographies may be included if not in the Workshop Notes.

The Workshop Notes is a compilation of published speaker notes accompanying their presentations. It should comprise material believed by the speaker to be of interest to the attendees and assist in understanding and explaining speaker's meaning so the attendee will have a record to take home.

HAVE FUN!

FOR ADDITIONAL INFORMATION & ASSISTANCE

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