

TRANSITIONING

from

FULL TIME *to*

CONSULTING!

For Developers

Now with more cats!



PRESENTED BY ANN ELIESE GREY FOR AIRCONF 2014

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Why Consulting?

- › INCREASE IN DEMAND AND ABILITY
- › CREATING YOUR OWN WORK SCHEDULE
- › WORKING REMOTELY FROM ANYWHERE
- › WORKING IN YOUR UNDERWEAR
- › IT CAN BE MUCH MORE LUCRATIVE
- › CREATING YOUR OPTIMAL WORKFLOW
- › CHOOSING THE PROJECTS (eventually)

*While “Consulting” actually means giving expert advice, in this case I am using it as an overarching term to also include freelance and contract development work.



Not This

(YET)

You may have heard things about working for yourself that might not be true.

- WAY MORE MONEY
- WAY LESS WORK
- DOING WHATEVER YOU WANT
- BEING YOUR OWN BOSS
- DEVELOPING HOW YOU WANT

STEPS TO SUCCESS



1

Preparing for the transition

2

Define your brand, services, and clients

3

Creating an environment and routine

6

Creating estimates, proposals, and scopes

5

Marketing yourself and Finding Clients

4

Finding the right tools to optimize your workflow



7

The money, the contracts, getting paid, and procedures

8

Working with clients and teams

9

Business growth - when and where to find help



Checklist

Things you really shouldn't slack off on.

- **SAVE SOME MONEY, LIKE MORE THAN \$500 BUCKS. SERIOUSLY**
- **GET AN LLC AND AN EIN**
- **GET A SEPARATE BANK ACCOUNT**
- **GET INSURANCE AND ANY OTHER SERVICES YOUR EMPLOYER PROVIDES.**

1 Preparation

- › **DON'T JUMP SHIP IMMEDIATELY**
- › **SAVE MONEY AND CREATE A BUDGET**
- › **FIND SOMEONE FOR ADVICE**
- › **DETERMINE YOUR RATE**
 - › **EXPERIENCE + DEMAND**
 - › **GLASSDOOR.COM**
- › **SETUP A BUSINESS ENTITY**
- › **SETUP A SEPARATE BANK ACCOUNT**
- › **DETERMINE INSURANCE NEEDS**

2 Defining you/(r) business

- › DETERMINE IF YOU WANT TO **OPERATE AS A BUSINESS**
- › DEFINE YOUR **CORE SKILLSET OR SPECIALTY**
- › CONSIDER **TARGETING** A MARKET OR INDUSTRY
- › PEOPLE WILL **GOOGLE YOU**. MAKE SURE YOU **LOOK GOOD**.
 - › **WEBSITE** yourname.com and company.com
 - › **LINKEDIN** personal & company page
 - › **FACEBOOK** professional profile & company page
 - › GITHUB, STACK OVERFLOW, REDDIT, TWITTER, ANGELLIST.....



Get a pro headshot

QUESTIONS?

We Talked About:

PREPARING FOR A NEW GLAMOROUS LIFE IN CONSULTING
DEFINING YOURSELF AS CAT, HUMAN, OR BUSINESS

Up Next:

PREPARING YOUR WORK ENVIRONMENT AND SETTING A ROUTINE
AWESOME TOOLS THAT WILL MAKE YOUR LIFE EASIER
HOW TO MARKET YOURSELF & HOW TO GET CLIENTS WITHOUT THE FORCE

Tell Me:

DO YOU HAVE ANY EXPERIENCE IN CONSULTING?



HOME OFFICE

PROS

no commute
no dress code
no expenses

CONS

lonely
hard to motivate
need space

CO-WORKING SPACE

PROS

collaboration
finding work
meeting space

CONS

expensive
noisy
availability

COFFEE SHOP

PROS

cheap
unlimited caffeine
close by

CONS

noisy
lack of space
uncomfortable

3 Environment & Routine

➤ FIND YOUR **PERFECT WORKING ENVIRONMENT**

➤ **HOME OFFICE**

➤ **CO-WORKING SPACE**

➤ **COFFEE SHOP**

➤ MAKE A **SAFE TRANSITION WITH CONTRACTS**

➤ HOME? CREATE A **SEPARATE ENVIRONMENT**

➤ SET A **SCHEDULE** A STICK TO IT

➤ SETUP A **PROCESS** YOU FOLLOW **EVERYDAY**

4 Workflow Tools

› TRACKING TIME, CLIENTS, AND INVOICES

› FRESHBOOKS, HARVEST, CURDBEE

› PROJECT MANAGEMENT & TASK TRACKING

› ASANA, PIVOTAL TRACKER, GITHUB, JIRA

› CODE AND ASSET TRACKING AND STORAGE

› GITHUB, BITBUCKET, SOURCEFORGE

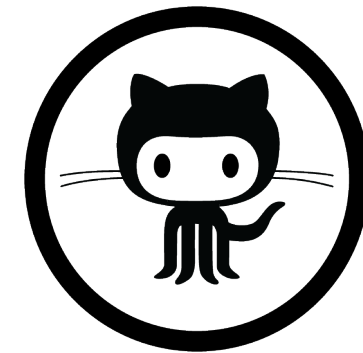
› GOOGLE DRIVE, BOX, DROPBOX

› DOCUMENT MANAGEMENT

› GOOGLE APPS FOR BUSINESS



PivotalTracker



5 Marketing, Work & Clients



- › **RESÚMES & BUSINESS CARDS** ARE STILL IMPORTANT
- › CREATE A UNIQUE **PITCH** AND **COVER LETTER**
- › MANY COMPANIES **HIRE REMOTE FREELANCERS**
- › **NETWORKING** EVENTS & **COLLEAGUES** ARE KEY
- › SENDING DIRECT **EMAILS** HAS GREAT **RESULTS**
- › SEARCH FOR **RFP'S** WITHIN YOUR **TARGET MARKET**

airpair.com
weworkremotely.com
flexjobs.com
careers.stackoverflow.com

authenticjobs.com
rfpdb.com
guru.com
linkedin.com

toptal.com
freelancer.com
odesk.com
blurgroup.com

QUESTIONS?

We Talked About:

HOW IS ANYONE PRODUCTIVE IN A COFFEE SHOP?
TOOLS THAT ANN LIKES BECAUSE ORGANIZATION IS GOOD
MAKING CLIENTS LOVE YOU AND FINDING WORK

Up Next:

ESTIMATES, PROPOSALS, AND THE LEAST FUN THINGS ABOUT CONSULTING
GETTING YOUR CLIENTS TO COUGH UP THE CASH
PLAYING NICE ON TEAMS FOR FAME AND FORTUNE
BUSINESS GROWTH AND HIRING EMPLOYEES OTHER THAN CATS

Tell Me:

DO YOU HAVE ANY TOOLS YOU LIKE?
DO YOU HAVE ANY TIPS FOR FINDING CLIENTS/WORK?



6 Estimates & Proposals

- › RESEARCH THE CLIENT FIRST
- › DETERMINE THE CLIENT'S BUDGET
- › THOUGHT IS KEY, CHEAPER != BETTER
- › ESTIMATES SHOULD BE CAREFULLY PLANNED
- › ADD 10% - 20% TO ESTIMATE
- › DETAILED SCOPE FOR FLAT RATE
- › MVPs ARE A GREAT ALTERNATIVE



Tools

When making proposals and estimates, these tools may come in handy.

- **QuoteRoller**
- **FreeAgent**
- **BidSketch**
- **QuoteRobot**



Protection

Options to protect yourself

- REQUIRE 50% UPFRONT
- START WITH WEEKLY INVOICE
- WORK IN YOUR ENVIRONMENT
- DO NOT TRANSFER ASSETS
- "WATERMARK" EVERYTHING
- ADD INTEREST TO LATE INVOICES

7 Getting Paid

- › CREATE A **CONTRACT** WITH A **LAWYER**
- › USE A **CONTRACT** WITH **EVERYONE**
- › GET A **RETAINER** FOR **HOURLY** PROJECTS
- › GET A **PERCENTAGE** UPFRONT WITH **FLAT RATE**
- › ALWAYS **TRUST YOUR INSTINCTS**
- › GET **INVOICES** OUT **IMMEDIATELY**
- › **CONFIRM** RECEIPT OF **INVOICE & PAY DATE**
- › **DON'T** BE AFRAID OF **SMALL CLAIMS COURT**

8 Working with Others

Working With The Client

- › **COMMUNICATION IS KEY**
- › **SET UP DAILY/WEEKLY MEETINGS**
- › **FREQUENT UPDATES ABOUT PROGRESS**

Working With A Team (non-lead)

- › **DEFER TO EXISTING TEAM FOR PROCESS**
- › **KEEP CODE TO THEIR STANDARDS**
- › **DOCUMENT/COMMENT A LOT**



Communicate

Useful tools that will help you keep in touch with your clients and teams.

- **GOOGLE HANGOUTS**
- **SKYPE**
- **HIPCHAT**
- **FUZE MEETINGS**
- **ASANA/PIVOTAL TRACKER/PM TOOLS**
- **BASECAMP**

9 Business Growth

- › MOST IMPORTANTLY: **DON'T OVERWORK**
 - › LOSE CLIENTS OR EVEN PROJECTS
 - › BURN YOURSELF OUT
 - › SERIOUS HEALTH ISSUES
- › **HOW MANY HOURS IS TOO MANY?**
- › **KNOW WHEN TO TURN PROJECTS DOWN**
- › **USE YOUR NETWORK TO FIND FREELANCERS**

THE END!



Now This

You're ready to take it to the next level, find some human freelancers to help.

- **LOCAL MEETUPS**
- **STACK OVERFLOW/GITHUB**
- **MESSAGE BOARDS/REDDIT**
- **LINKEDIN CONNECTIONS**

FAREWELL!

AND THANKS FOR ALL THE FISH

YOU MAY NOW SUBMIT THE FOLLOWING:

**QUESTIONS? COMMENTS?
COMPLAINTS? SUGGESTIONS?
COMPLIMENTS? RANTS? CATS?**

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