BUSINESS ANALYSIS PROFESSIONAL DEVELOPMENT SERIES

Successful Business Analysis Consulting

Strategies and Tips for Going It Alone

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CHAPTER 1: THE JOURNEY FROM PRACTITIONER TO CONSULTANT

Practitioners in the fields of business analysis and project management follow a common career path. You begin, of course, as an entry-level novice. As you gradually accumulate knowledge and skills through both work experience and professional development activities, you move to an experienced intermediate, or journeyman, level of proficiency. Ultimately, you might become an advanced, expert-level business analyst (BA) or project manager (PM).

Senior BAs are recognized by their colleagues as experts in numerous analysis techniques. Their peers look to them for advice and assistance. Advanced BAs often are selected by management to spearhead changes in processes or methodologies on the organization’s projects. It’s an important—and valued—position to achieve.

But then what? To where do you steer your career from being a respected internal expert? Some people take their unique skill sets, organizational knowledge, business acumen, and technical knowledge and become successful business analysis consultants, trainers, and entrepreneurs. The path to consultant is paved with expertise in business analysis, product management, project management, process improvement, leadership software development, and other areas of information technology (IT). Whether working as an employee of an established consulting firm in this industry or going it alone in a company of one, consulting offers the highly talented BA a fulfilling—and challenging—career opportunity.

Why This Book?

There are many books on consulting written by business people who successfully climbed the corporate ladder to a senior management level and were among the fortunate few to achieve success in consulting. However, I noticed a significant void in the current consulting literature geared toward practitioners in technical fields, most noticeably in business analysis and project management. You don’t need to become a corporate executive before launching a career as an IT consultant. But you do need deep knowledge, broad experience, good observational abilities, and excellent communication skills.

I have been self-employed full-time as a software consultant since early 1998. Without necessarily planning to, I wound up specializing in software requirements and business analysis, project management, software quality, and process improvement. I began doing this sort of work even before going independent, while I was still working for a large corporation. This let me wade into the pool instead of diving straight into the deep end.

I wrote this book to share the many insights I have accumulated over the years, sometimes through the painful experience of making mistakes. This is the kind of book I wish was available before I decided to give consulting a try. Several other seasoned consultants with IT backgrounds also contributed chapters to this book to share their own experiences and perspectives. The information we present will reduce both your learning curve and the fear factor when you decide to test the waters as an independent consultant.

The examples and stories in this book come from my personal experience and those of my contributing authors working in the worlds of both traditional and agile business analysis, project management, and software development. The strategies and tips provided apply both to the practicing consultant and to those planning to make the transition to independent consultant in nearly any field. Even if independent consulting isn't in your immediate future, you'll discover many useful suggestions here about giving presentations, writing for publication, and working with others.

Consulting in the IT Industry

The IT industry has an abundance of consultants who perform many types of work. Some become well known in their domain, publish popular books, become featured speakers at conferences worldwide, and earn impressive incomes. Others find that they just don't get enough business to stay afloat and have to go back to regular employment. Many independent consultants relish the diversity of the work, with its many opportunities to collect and leverage insights from their clients and to influence both practitioners in their field and the field in general. Others discover that the travel is grueling, frequent absences are hard on family life, and having an unpredictable income is unsettling. Consulting is not for everyone, but it can be a fun, rewarding, and lucrative career for those who learn how to make it work for them.

Perhaps you've heard this rather disparaging saying: "Those who can, do; those who can't, teach." I extend this by adding, "Those who did, consult." The effective consultant has a breadth and depth of experience in his or her field, the skill to assess a situation quickly and diagnose the root causes of problems, and the ability to convey new ways of working to clients so they achieve better business outcomes. Consultants must be adaptable, able to choose the right techniques from their tool kits to suit each client's needs and culture. By working with diverse clients, effective consultants soon recognize patterns of common problems and solutions that span organizations and business domains.

Having a wide range of project experience helps prepare you for a consulting career. But there's more to it than that—simply being very good at what you do doesn't necessarily make you a great consultant. You must be familiar with a rich suite of techniques in your field, so you can help people tackle many different kinds of problems effectively. You need to keep up with the literature in your domain, so you know about important topics and trends and can advise organizations based on the best available wisdom.

An effective consultant can distinguish practical techniques that we know are effective from the latest buzzword-laden fad. As a skilled observer, a good consultant notices what works and what doesn't work in various situations and synthesizes that knowledge into practical solutions. On top of all this, a consultant must be a credible and talented communicator who can pass along frank observations about an organization's shortcomings and gently persuade clients to try new methods.

People in IT use the term *consultant* in various ways. I have a friend who is a true software development consultant. He's one of the world's leading experts in a particular programming language. He doesn't build software for clients, but he is highly respected as an authority who can come into an organization and convey deep insights that help developers solve leading-edge problems in that language. On the other hand, many software development *consultants* are really independent contractors who are self-employed and finding their own jobs writing code for one client after another.

Some BAs also work as independent contractors, coming into an organization for a period of time and performing BA services on development projects, either on their own or as part of a BA team. Business analysis naturally lends itself to this form of consulting, since the team role is not necessarily full-time throughout the entire duration of the project and BAs are accustomed to moving from project to project. True expert consultants, though, might lead and coach a team of BAs. They could deliver training, or they may assess and then advise organizations about how to tune up their current BA practices and address performance shortcomings. Consultants will sometimes help develop and instill new techniques into organizations and steer them to a more sophisticated business analysis culture.

Similarly, project management consultants can either work on contract, leading one project after another, or they can train and coach the organization's own PMs to enhance their effectiveness. Some PM consultants specialize in project recovery, coming in to get a struggling project back on track.

Still other kinds of IT consultants focus on process improvement or change leadership, helping organizations evolve. Or, they might specialize in particular areas of software development, such as architecture, software design, database development, or testing. Some experts help their clients learn to use specific languages, methodologies, or development tools. The varieties of IT consulting match the varieties of IT work.

Both business analysis and project management are project roles. Someone must perform these essential tasks on every project. They might have the corresponding job title (or an equivalent, such as requirements engineer, requirements analyst, or systems analyst), or they might do it along with other project responsibilities, such as coding or quality assurance. Traditional software teams often are accustomed to having these roles staffed by specialists, whereas BA and PM responsibilities may be distributed across multiple individuals on agile development teams. As projects become larger and more complex, the need for team members who are very good at business analysis and project management increases. Organizations that lack BA or PM expertise can benefit from bringing in consultants in those areas to educate and advise. That's where you come in.

The diversity of independent consulting experiences is practically boundless. You can guide your career in whatever direction you like, taking best advantage of the kinds of work you find most satisfying—so long as the phone rings enough to keep you in business.

How I Got Here

By way of background, let me describe how I got started in the consulting business. After obtaining a PhD in organic chemistry from the University of Illinois, I began my professional career in 1979 as a research scientist at Kodak in Rochester, New York. Computer programming was my second interest after chemistry; one-third of my PhD thesis was code. For several reasons, I moved into software development full-time at Kodak in 1984. Six years later, I took over as the manager of my small software group.

I began learning as much as I could about software process improvement through books, periodicals, and conferences. Soon I found myself helping other groups inside Kodak with various aspects of software development, thus serving as an internal consultant and trainer. This ultimately led to a position guiding software process improvement efforts in one of

Kodak's digital imaging technology areas. Shortly before I left the company, I was leading process improvements in Kodak's web development group, the people who bring you kodak.com.

In 1991, I began speaking at conferences, while continuing to write magazine articles about various aspects of software engineering. Three years later I received my first invitation to speak at another company on some of the work I'd been writing about. More of these types of opportunities arose, thanks to my increasing visibility as an author and speaker. Before long I was delivering training and consulting services for other companies on my vacation time, while still working full-time at Kodak. This was all done with my management's knowledge and approval. It was a comfortable way to ease into a consulting career.

My first book, *Creating a Software Engineering Culture*, was published in 1996, while I was still at Kodak. Shortly thereafter, a well-known software consultant asked when I was going to leave the corporate world and hang out a shingle as an independent consultant. My initial reaction was that this seemed pretty risky, considering that I like to eat every day. But after reflection, I decided to give it a shot.

I officially launched my one-person consulting company—Process Impact—in December of 1997. A few months later I left Kodak to see how things might go on my own. I figured I could always get a real job again if consulting didn't work out for whatever reason. As it happened, being an independent consultant, trainer, and author has worked out just fine.

Being Self-Employed

Some consultants find work through agencies. Others are employed by a company that contracts their consulting services out to clients. However, with one six-month exception very early on, I've always worked entirely on my own through Process Impact. (Incidentally, I have found that, even in a one-person company, management is uninformed and unreasonable, and the staff is lazy and has a bad attitude.) When I started out, I knew little about this new mode of employment, yet I had few resources from which to learn.

I did learn several things about consulting early on. First, I was fortunate to get plenty of work. That was a relief, as many new consultants struggle to stay afloat. Second, I found that I really enjoyed the flexibility of being self-employed. While at Kodak, I concluded that I do not need to be managed and I do not enjoy being a manager, so self-employment in a one-person shop suits me well. And third, I discovered that there's a *lot* to learn about being a self-employed, self-managed independent consultant.

Many of the strategies and tips in this book will also be useful to practitioners—sometimes called consultants—who are engaged in staff-augmentation contracting relationships as temporary corporate or government employees. Certain topics covered here might not be as important to consultants who work for larger companies rather than being self-employed. But even if you aren't on your own at the moment, someday you might be.

Casting a Large Net for Knowledge

When I told my Kodak colleagues I was going to give consulting a shot, someone asked how I'd be able to keep up with what was happening in the software industry if I didn't work on projects anymore. That was an interesting question I hadn't considered. However, I quickly realized that, as a consultant, I could see how many projects and organizations operated, instead of just observing a few projects in one company for a prolonged period. Instead of making every mistake and climbing every learning curve myself, I could learn by looking over other people's shoulders. Everyone I met at a client site, conference, or professional society meeting was a potential source of knowledge.

Visiting a wide variety of companies was far more informative than working inside a single microcosm with people steeped in the same corporate culture. It let me collect a breadth of information that I could then share with others, for a very reasonable price. I'm pretty good at synthesizing knowledge from multiple sources, packaging it, and delivering it in a practical and accessible way. That's the essence of being a consultant.

There was a second unobvious aspect regarding the knowledge you can—or cannot—acquire through consulting. I've done a lot of work in the field of software requirements over the years. People occasionally ask me, "Karl, what do the companies that are really good at requirements do?"

My reply is, "I don't know; they don't call me." That is, my clients are always people who know they want to improve how their teams perform certain aspects of their work. They invite me in to help assess those opportunities, provide knowledge through training or coaching, and assist them in migrating toward better ways of working. Companies that are already confident in their business analysis capabilities don't ask me to work with them. Hence, I have no way to learn what's working well for them unless they publish their experiences for all to see.

The other people who never call me are those who either aren't even aware that they have problems or don't opt to address them. It's hard to sell a better mousetrap to people who don't realize they have mice.

How this Book Is Organized

This book contains 35 chapters that are grouped into six parts. Part I (Setting Up Shop) addresses laying the foundation for your consulting business, including letting the world know you're open for business, several different modes of consulting engagements, and the impacts that being a self-employed consultant can have on your life and your family. Another chapter offers some comments on participating in professional organizations, both as a way to find possible clients and to pursue relevant professional certifications.

Part II (*On the Job*) covers many realities that I had to learn through trial and error; the errors weren't that much fun. Chapters address using checklists to keep all the activities you're juggling under control, techniques for engaging with clients in various situations, descriptions of some ideal clients, and some warnings about clients who can cause headaches for you and how to deal with them.

In Part III (*Practicalities)* you'll find valuable tips for such essentials as setting rates, managing your finances, and negotiating and crafting written agreements with your clients. Other chapters discuss establishing business policies and the important topic of purchasing appropriate insurance coverages. You might have the opportunity someday to partner with another consultant on a larger project, so I'll share some tips about how to make such arrangements work well.

Your business will probably start out a bit slow, leading you to look for ways to create growth. Part IV (*Building the Business*) suggests ways to do this. I will describe how I established multiple revenue streams, so I could hear the *ka-ching* of incoming cash even when I wasn't doing anything related to the company. Other chapters in this section provide suggestions for landing both new and repeat business, as well as many tips for consulting from a distance.

Although I've always called myself a consultant, most of my independent work has involved training. Teaching classes and making presentations are common consultant activities, so Part V (*Media Matters*) offers many tips for delivering effective presentations with confidence. It also describes ways to leverage your intellectual property (IP) repeatedly through different media formats, as well as addressing some important issues of copyright, fair use, and managing your valuable IP.

Written communication is a core skill for any consultant, BA, or PM. Hence, this book closes with Part VI (*Writing Your Way to Success*). Publishing lets you simultaneously share your knowledge with the world and market your expertise to prospective clients. This final set of chapters provides a wealth of information about writing for publication, including magazines, websites, blogs, and books. A prolific author once said that you can't consider yourself a good writer until you've written at least one hundred thousand words. My books alone total well over one million words. It's not for me to say if I'm a *good* writer, but I've learned a few useful things along the way, which I share in Part VI.

Each chapter in the book ends with a list of next steps, actions you can take immediately to begin applying the guidance and tips presented. If you are just starting out or early in your career as an independent consultant, I suggest you try the activities in these next steps as you finish each chapter. They can save you time and pain in the future.

Several chapters refer to items you might find useful, such as sample forms, checklists, and other reference items. You may download these from the Web Added Value™ Download Resource Center at www.jrosspub.com.

Some Caveats

Let me emphasize that nothing in this book should be construed as legal advice. I am neither an attorney nor an accountant. Consult appropriate professionals with questions regarding legal matters, including finances, taxes, insurance, contracting, and how to structure your company.

You might conclude that certain approaches my colleagues and I have found to be valuable are a poor fit for your situation. In that case, it would be silly to take our advice. Instead, look for the idea behind each recommendation here, and then see if there is some thoughtful way to adapt that to your situation. As with all such writings, your mileage may vary from mine.

Why Keep Reading?

I wish I had had a mentor to rely on for assistance, to answer the countless questions I had when starting out as an independent consultant. One seasoned colleague warned me, "You'll be making a lot of trips to your local office supplies store." True, but there's so much more I needed to learn, from essential matters like how to find clients and how much to charge, down to minor practicalities such as how to uniquely identify invoices. (I use a code with an abbreviation for the client's name, the current year, and a sequence number within the year, such as IC1904 for the fourth invoice I submitted to client InfoCorp in 2019.)

Perhaps this book can serve as a useful resource for you if you're pursuing a career path similar to the one I chose. Even if you're not aiming to be an independent consultant just now, you'll find plenty of information here to enhance your own professional capabilities.

Next Steps

- List your professional goals as a BA or PM. In what ways do you feel that your current position would make it difficult to achieve these goals? How might becoming an independent consultant help you achieve those goals?
- Identify the reasons why you want to be an independent consultant. Consider why you think being a consultant would be better than your current position, and balance that against the advantages of your current position. Does the comparison give you confidence that independent consulting makes sense for you?
- If you're aiming to become a business analysis consultant, take an inventory of your suite of BA knowledge, skills, and resources. What are your great strengths as a BA, what are your competencies, and what gaps in your knowledge should you close to be able to help clients most effectively?
- If you've worked with consultants before from the client side, which ones impressed you the most? Why? Did they have particular knowledge, abilities, or behaviors that you found especially effective and beneficial to your organization? List those attributes that you could try to emulate in your own consulting career.
- Think of any experienced consultants you know who might be able to mentor you in this new way of working.

CHAPTER 12: CLIENTS WHO GIVE YOU GRIEF

I have worked with about 130 clients in my years as a consultant and trainer, including companies in the United States and abroad; government agencies at the federal, state, and local levels; and individuals. I've sold my products to hundreds more customers worldwide. Nearly all of these have been easy and trouble-free to work with. But a few have given me headaches. This chapter relates some of the problems I've encountered, so you can be alert for those in your own consulting work.

Getting Stiffed

Several consultants I know have been stiffed by one or two of their clients—they simply never paid for services rendered. This has happened to me just once (see Chapter 19, It's a Matter of Policy). I've come close a couple of other times. I once did a two-week European seminar tour sponsored by a software tool vendor, teaching six one-day courses in three countries. Afterward, I simply could not get the company to pay me. It wasn't a trivial amount of money, either.

After multiple requests, I finally received payment. The check required the signatures of two company officers, yet no one at all had signed it! I was fed up. In a pretty sour mood, I called the company's president. A check for the full amount—signed, no less—arrived the next day by overnight delivery. Amazing, eh? It just shouldn't be that difficult to get paid for the work you've done.

On two occasions, individual customers did not pay for products they had ordered from me. They ignored my invoices and follow-up emails. As it happens, both of these customers were outside the United States. Consequently, I changed my billing policy: now I will no longer ship a product to a purchaser outside the U.S. until their payment is sitting in my bank account. It's a shame that a very few people make life more difficult for everyone through their irresponsible actions.

I have occasionally had problems with delayed payments when a client required my little sole-proprietorship company to enter into a subcontracting arrangement with one of their established contractors. The contractor typically waits until the client pays them for my services before they will pass the funds along to me. This can add a month or more to the usual payment cycle.

Last year just such a contractor did not pay me on time and would not respond to my inquiries. No one at the state government agency for whom I had done the work seemed to have any influence over the contractor, whom they had already paid. It took several months of inquiring, cajoling, threatening, and escalating (I consulted with a contracts attorney), but I finally did get paid in a series of biweekly installments. Such income uncertainty—let alone the hassle factor—is just one of the issues you have to get used to as an independent consultant.

I suspect the contractor was having some cash flow problems that led to the delayed payment. Now, I'm not an unreasonable man. If they had simply told me about the situation, we could have worked out a payment schedule without this level of acrimony and frustration. I'll never work for that client again, and I'll never work as a subcontractor again.

On the plus side, for the first time in my twenty-four-year consulting experience, I had to invoke the interest-due-for-late-payments clause that I include in every client agreement. Amazingly, the contractor paid the extra money without argument. So the situation resulted in a good financial outcome for me, although it wasted a lot of time, energy, and goodwill, and for a while I feared I wouldn't be paid at all.

Firing a Client

One year, when I was still working at Kodak before going independent, I helped plan our internal software engineering conference. We were considering a speaker for the keynote presentation, a well-known figure in a particular software area. However, one of the planning committee members said that the consultant we had in mind had experienced a previous unpleasant incident with Kodak, and that he was no longer willing to work at the company. No one knew exactly what the details of the problem were.

At the time, my reaction was, "How arrogant!" When I became a consultant myself, however, I discovered that some clients simply aren't worth the trouble. There are a very few clients that I won't work with again for various reasons, including sluggish payments, too many problems encountered with contracting or invoicing (like invoices that disappeared simply because one particular individual changed jobs), and incredibly slow or erratic decision making. If the opportunity arises and you need the income, you'll probably just bite your tongue and tolerate difficult clients. But if you have the luxury of having enough work, it sometimes makes sense to say, "Thanks, but no thanks" when certain clients call you again.

One of my consultant friends tried for nearly eighteen months to receive a payment from a large technology company, to no avail. Ultimately, they offered to pay him a discounted amount within thirty days or the entire balance at some indeterminate future date. Totally fed up, my friend contacted the office of the president of this huge company. To his relief, he was paid right away. Wouldn't it have been easier for everyone if the company had just paid the bill as promised? My friend refused to do any further work with that client. Coincidentally, I had so many problems with that same company myself that years ago I decided not to deal with them again either. They just aren't worth it.

Problems with clients sometimes lead to changes in your business practices. When I encountered a couple of clients who took far longer to pay me than I thought was reasonable, I adopted a new policy. Rather than invoicing a new client after I deliver a training class for the speaking fee plus my travel and lodging expenses, I began quoting an all-inclusive fee, submitting an invoice in advance, and requesting that payment be delivered when I arrive to present the course.

Nearly all of my clients accepted this policy. I might relax the policy when I have a sustained and successful relationship with a client or in other special circumstances, like when I wish to defer income into the next calendar year for tax reasons. Otherwise, though, the class starts when I receive my check.

Some consultants request payment of a portion of their fee in advance, which they retain if the client cancels the event. I've never done that, although I do include a cancellation fee in my speaking agreement. See Chapter 17 (*Everything's Negotiable*) for more about cancellation fees.

Questionable Ethics

I use a simple written consulting agreement to itemize the specifics of each client engagement. A prospective client once asked me to state in the agreement that I would be performing a certain kind of work, because that's what they had funding for. In reality, though, I would be doing something different while I was on site. My client told me that if the agreement stated what I would really be doing, his management wouldn't approve it.

This struck me as unethical. What if a senior manager had discovered that I was doing something other than what had been approved and funded? Not only would I probably not get paid, I wouldn't be hired by that company again, and my professional reputation could be damaged. Maybe I could even get sued.

Perhaps there are some gray areas when it comes to integrity. But if someone explicitly asks you to lie about work that you do, that's black-and-white. I declined this invitation and never dealt with that company again.

A Poor Fit

The notion of being scrupulously ethical in professional dealings applies to consultants as well as to clients, of course. While I was at Kodak early in my software development career, my team needed to bring in a database consultant from a major vendor for some short-term help. I spoke to the prospective consultant and asked how much experience he had in the area with which we were struggling.

"I haven't done that before," he replied, "but I can learn along with you." I'm sorry, that answer is incorrect, but thanks for playing. It seemed unethical for him to request that we pay $1,200 a day for him to learn alongside us. We found a different consultant who knew what he was doing.

As a consultant, it's important to acknowledge your limitations as well as your capabilities. Once in a while, I receive an inquiry from a client who's seeking help in an area in which I lack expertise. I never offer a proposal in such a case, because I know there are more appropriate people available. If someone can do a better job for the client than I can for a particular service, that's who the client should hire. I'm always happy to refer a potential client to another consultant who's a better fit for their needs. Similarly, I'm grateful when other consultants point clients toward me.

I neither pay nor accept finder's fees for these sorts of referrals, although I have known other consultants who did. I figure that if everybody is willing to help match up prospective clients with the right consultants, then everybody's back gets scratched. It all averages out in the end.

Knocking Your Head against the Wall

A consultant friend of mine, Peter, pointed out that when you've lost hope of having any effectiveness with a client, it's time to move on. You should also bail if a company is abusing or taking advantage of you in any way.

Peter once consulted for a company that practiced what he termed *management by rage*. Peter made it clear to his contacts that there had better not be any rage directed at him. The relationship worked for a while, but then Peter became viewed as a threat by one of the managers. One day that manager raged at Peter behind closed doors for twenty minutes, complaining, "You're trying to take over my job!" In reality, Peter had no interest in the manager's job. The man was simply being unreasonable. Peter did get the manager to apologize to him at one point during the meeting for making such outrageous statements.

Afterward, Peter was understandably shaken by the experience. After he calmed down, he thought about whether he still wanted to pursue that consulting engagement. He decided that he didn’t, so he quit. The company’s management sent a more reasonable person to see how much money Peter wanted to come back, but Peter still said no and walked away.

Again, a very few clients simply are not worth the aggravation they cause. Try to identify them early and make your escape.

Clients Who Go Dark

I once had a client who brought me in twice, both to deliver some training classes and to do some consulting work. I thought the events all went fine, and the manager who hired me seemed happy with the results. At the end of my second visit he said he wanted to set up another engagement soon.

After I returned home, I sent this manager a speaking agreement for the dates he had requested. No reply. I emailed him several more times to follow up. No answer. I phoned and left several voice mails. No response.

This client literally never contacted me again. I don’t know what the problem was, but I would have appreciated it had he simply told me they were no longer interested in my services. This would have saved me the time and trouble of repeatedly attempting to contact him, which I was doing at his request, after all. Weird.

Actually, I did hear from him a few years later, in a way. I received a flood of virus-infested messages that appeared to come from his email address. Somehow, that seemed fitting.

Next Steps

- Think of any specific problems you have had with clients. Perform some root cause analysis to understand why each problem occurred. Is there anything you could have done to detect the issue earlier and keep it from becoming an actual problem?
- List any clients you’ve had that you wouldn’t want to work for again. Why not? Are you being reasonable in blocking them out? Are there warning signs you could look for in the future to see if another client might pose similar problems?
- State any conditions or actions that would make you reluctant to work with a client again.

CHAPTER 27: SEVENTEEN TIPS FOR BECOMING A CONFIDENT PRESENTER

I'm not quite sure how it happened, but somewhere along the way I became a public speaker. I never took a speech class or participated in debate in school. I never attended Toastmasters International or any other group that helps you become comfortable standing before an audience. Nonetheless, I've delivered well over 600 presentations in the past 28 years and enjoyed just about all of them. Somehow, I have become comfortable speaking for anywhere from 30 minutes to four days, to audiences ranging from just a few people up to several thousand.

Most consultants, business analysts, and project managers will be called upon to give a presentation or teach a class from time to time. Speaking in public is a terrifying experience for many people. That fear even has a name: glossophobia. The anxiety is understandable. Everyone is staring right at you, awaiting your words of wisdom. You feel exposed and vulnerable. It's one thing to say something foolish in a private conversation; it's quite a different matter to say it to dozens, hundreds, or thousands. The potential for embarrassment is enormous. However, so is the potential for sharing important information that can influence many people in a positive way, not to mention the potential for making a lot of money.

Just in case you—like so many other people—are nervous about giving presentations, here I share Karl's Tips for Confident Public Speaking. Keeping these ideas in mind will help chase the butterflies from your stomach. Maybe you'll even have fun the next time you're on stage.

During Preparation

Laying the foundation for a confident presentation begins long before you step into the spotlight. The following suggestions will help you construct a presentation that holds the audience's attention, achieves your objectives, and keeps you calm.

Presentation Tip #1: Determine your purpose

Think carefully about the goal for each talk you design and deliver. Is it to educate the audience or maybe to persuade them to adopt a particular point of view? Perhaps you're reporting the status of some project or strategic initiative, or you're trying to establish a shared vision toward a common objective. Occasionally, you might want to provoke controversy deliberately, stimulating the listeners' thinking so they can break out of the box of tradition and generate new ideas.

A stimulating presentation can serve as a rousing call to action, so contemplate what you would like the members of your audience to think or do differently after they hear you speak. Considering these goals in advance will help you select the right content and delivery style to achieve your objectives. If people walk out of a talk without thinking differently or deciding to work in some new way, what was the point?

Presentation Tip #2: Know your audience

This is often stated as Rule #1 for giving a presentation or writing an article. I happen to believe that knowing your subject is really Rule #1, but knowing your audience is a close second.

Knowing your audience includes understanding the forms of communication that will resonate most strongly with them. Do they respond to textual bullet points on slides, or do they prefer tables, charts, and complex graphics? Will animations, cartoons, and videos hold their attention, or will they distract from your serious message? Do you need slides or other visual aids at all? Perhaps most important, what topics will grab their interest?

I once attended a lecture series on various science and engineering topics. One night an engineering professor spoke on the history of the toothpick. It was every bit as fascinating as it sounds. People began sneaking out of the auditorium within minutes after the lecture commenced. No visual aids could have livened up a topic that dull.

In addition, think about why the audience is there. What are their interests, concerns, assumptions, biases, and fears? This will help you set the tone of your presentation. If you're declaring a new strategic direction for the company, people are going to be nervous about the implications for their own jobs. Do you want to soothe their concerns? Or do you want to boldly set the new agenda and invite everyone to get on board? Some 25 years ago I heard a top executive at a huge corporation describe his vision for the company to nearly 3,000 employees. He explicitly stated, "If you're not comfortable with this strategy, we can part friends." It was clear that he wasn't going anywhere. We all got the message: you can either stay on the train as it changes direction, or you can get off at the next stop.

Presentation Tip #3: Anticipate resistance

This is not much of a concern for educational talks, but certain types of presentations might not be well received by the audience, for a variety of reasons. If you're giving such a talk, take the time to anticipate what kinds of resistance your audience members might have to your message and how you might preemptively overcome those. Political speeches can certainly fit in this category, depending on to whom you are delivering them. Corporate presentations that deliver surprising news or announce new strategic initiatives can trigger resistance, dissatisfaction, and fear. Combine these first three tips to make sure your presentation goes over well and that it lays the foundation for moving forward, whether the news you're delivering is good or bad.

Presentation Tip #4: Go to the right place

I used to be a regular speaker at a series of software development conferences held in the San Francisco Bay Area. Some years they were at a convention center in San Francisco itself, other times in San Jose or Mountain View. Another regular speaker I knew once went to the San Francisco convention center, but the conference was held in San Jose that year! He had to frantically race the 50 miles to San Jose, barely making it in time for his presentation. It pays to know where you're heading before you make your travel arrangements.

I've been burned by location ambiguity a few times. At one client site, I was delivering a two-day course for business analysts, followed by a one-day management presentation. Not having been told otherwise, I assumed both would be held in the same location. So on the morning of day three, I went back to the same room where I'd taught the previous two days, only to find a different event underway. With some effort, I learned that my second class was scheduled for a building a quarter of a mile down the road. I had to hustle to get there.

Early in my consulting career, I arrived at a client's central location outside Washington, D.C., to teach a class, but the office was deserted. I didn't have a phone number for my contact person, a mistake I never made again (why do we learn so many important lessons from our mistakes?). It turned out the course was being held at a conference facility about eight miles away. Unfortunately, no one had thought to inform me. I had only the address for the company's main office, so that's where I went. One employee just happened to stop by the main office and gave me a ride to the training location. Had she not appeared, I'd probably still be waiting there today.

I had a similar experience just last year. This time I had phone numbers, but none of the three contacts I tried to reach the morning of the class answered their phone. A helpful receptionist did her best to figure out where the class might be held, to no avail. The location had been changed, and again I wasn't notified. A student in the class wandered by the reception area and recognized me, so I made it to the right room eventually. This is mighty frustrating. And the three contact people for whom I left voice mails never got back to me at all. Weird.

Presentation Tip #5: Take backups

I have my PowerPoint presentation on my laptop, a copy of the file on a flash drive that I carry separately from the laptop bag, and another copy stashed in a secured private folder on my website. Any cloud storage, like Dropbox or iCloud, will work if you don't have your own website.

The flash drive is in case my laptop dies, gets lost, or is stolen, or if it doesn't get along with the presentation room's projector and I need to use a different computer. I always save the PowerPoint file with fonts embedded, as another random computer might lack some fonts I need. The cloud backup is in case all else fails. You can't have too many backups.

It's also a good idea to carry electronic backups of any handouts that are supposed to be distributed with your presentation. I have occasionally had problems with staff members at the conferences where I'm speaking misplacing my materials. I always turn in my materials for duplication well before their deadline, but the staff at one conference where I was a regular speaker lost track of those files from time to time. Then they would follow up very late to remind me to send them my materials, which I had already done. That made me nervous.

One year I double-checked with the conference staff to ensure they had received the file I had sent them, a sizable handout for my full-day tutorial. No problem, the person I spoke to replied; we have everything right here, and it all looks fine. But when I arrived at the conference site, a different staff member asked me, "Did you bring the handouts with you? We never received your tutorial materials."

I was pretty ticked about this. I explained the background and said that I had confirmed their receipt of the handout materials. The staff member looked around on their network and said, "Oh, yes, there's your file. Now I remember. It was in some format we couldn't read."

I replied that the person I had spoken to months earlier had assured me she could open my file just fine. This staff member double-clicked on the file; it opened up and displayed correctly.

"What more do you want from me?" I asked with annoyance. How frustrating that was, particularly because I had so carefully followed up after my multiple previous problems. Fortunately, they were able to get the handout printed and delivered to my room only a half-hour late. I never delivered a tutorial at that conference again, just a keynote a few years later. They were too unreliable.

During the Presentation

So now you are ready to go. Your abstract is written and distributed; the slides are laid out and fine-tuned to perfection. You've practiced the talk and have a clear mental image of what you want to say for each slide. Even your jokes are ready to launch.

The big day arrives. You go to the presentation room, heart in your throat. There are a lot of people out there, waiting to hear what you have to say. Keep the following tips in mind to calm your nerves before and during your speech.

Presentation Tip #6: No one knows what you're going to say next

Don't worry if the words that come out of your mouth don't exactly match the way you planned, scripted, or practiced them. Just keep going. A presentation is very different from, say, a piano recital of a well-known musical composition, where someone in the audience is sure to notice a B that should have been a C. If you forget to make some point, try to work in smoothly later on. No one will know.

Presentation Tip #7: You are in control

You're the one with the podium, the microphone, the projector, the laser pointer. You're the one who can ask the audience if they have any questions. You can terminate the discussion and move on whenever you like. You control the pacing. It's your show—enjoy it.

Presentation Tip #8: You probably know more about your topic than anyone else in the room

Otherwise, one of them would be speaking, and you'd be listening. Even if you're not the world's expert on the subject, you're likely to be the local expert for that hour or day.

It can be disconcerting to stand before a conference audience and recognize a well-known authority on the topic in the crowd. Most such authorities will keep a low profile and not ask embarrassing questions or try to take over the presentation. At least, that's what I do when I'm attending a talk in one of my areas of expertise. I don't want to make anyone uncomfortable. I might amplify upon an answer to a question if it seems appropriate or if the speaker invites me to. Otherwise, I just sit, listen, and learn.

Rarely, I have seen a famous person take an inappropriately intrusive role in someone else's presentation. I find that irritating; the speaker probably does as well. So if you're the famous person at someone else's talk, please remember that it's the speaker's show, not yours.

Presentation Tip #9: You rarely face a hostile audience

Attendees are there because they want to hear what you have to say. This isn't necessarily true if you're dealing with a controversial issue or if you're speaking at a political or government meeting of some kind (see Presentation Tip #3). But if you're delivering a factual presentation to a group of people who are attending of their own volition, they usually start out with an open and receptive attitude. After that, it's up to you to hold their interest and persuade them of the merits of your message.

Keynote presentations at conferences might constitute an exception to this tip. A keynote topic sometimes is deliberately provocative, chosen to recalibrate the thinking or trigger the emotions of the audience. In a case like that, you should expect a more energetic reaction than usual from the audience.

I opted for this approach when I delivered my very first keynote address, at a software process improvement conference with some 1,800 attendees in 1999. In fact, the man who invited me to do the keynote told me to bring my most stimulating and provocative material. So I came up with the title *Read My Lips: No New Models!*

My premise was that the software industry already had plenty of models and methods available for increasing our quality and productivity. What we lacked was the effective and consistent application of those proven techniques. So I was encouraging people not to develop any more new models just then, but rather to work on reducing to practice what we already knew worked.

This was indeed provocative, especially because the organization that sponsored this large conference had led the creation of many of the models about which I was saying "Enough!" When I reached the podium, I was a bit taken aback to see the man who began this whole improvement-model movement sitting in the very front row of this huge auditorium. I had never met him, although of course I knew his work. He didn't say anything during the presentation (see Presentation Tip #8), but his body language wasn't encouraging.

Years later, I met someone who had sat with that luminary at my presentation. I was relieved to learn that his reaction to my thesis was: "Karl's right." I'm not sure everyone who attended the talk agreed, but my keynote certainly did stimulate discussion that went on for the duration of the conference. That was my goal.

Presentation Tip #10: Avoid saying "on the next slide…"

I learned this trick from my PhD thesis advisor in graduate school. Maybe you don't remember just what's on the next slide, or perhaps you changed the sequence from the last time you gave the presentation. When we used actual 35mm slides back in the Stone Age, they might not have been loaded in the slide carousel exactly as you had planned.

If you say "on the next slide" but you're surprised by what then pops up, you might have to backtrack a bit—awkward. Instead, just display the next slide in the sequence and talk about whatever is on it. In other words, it's okay to fake it a little bit. You have to roll with reality even when it doesn't match the plan.

Presentation Tip #11: Don't state how many points you want to make about something

In some of my talks I will reveal a particular bullet point and then say, "There are three things I want to say about this." That can be a bit dangerous, especially for those of us with brains that are, shall we say, slightly older than average. On several occasions, I have conveyed the first two points just fine but forgotten precisely what I intended to say in the third point. So then I either have to mumble some new "third point" on the fly, hope my brain comes through with my original third point before I move on to the next slide, or hope no one remembered how many points I had promised them. It's safer to say, "I want to make several points about this." Then I can offer as many—or as few—comments as come to mind at the time without worrying that someone might ask what my third point was going to be.

Presentation Tip #12: Don't read the slides to the audience

They can all read just fine (assuming you've used a suitably large font—consider the room size when laying out your slides). Don't cram masses of text on your slides. Show concise bullets and images that will help the listener remember what you told him when he reviews the presentation in the future. Reveal elements of the slide, such as bullets or graphics, one at a time, instead of showing an entire complex slide and then walking the audience through it.

To prompt your memory, especially with a new presentation, you can use the notes view in PowerPoint to write the abstract of what you want to say about each slide. If you need the reminders during your talk, you can keep a stack of printed notes pages on the table or podium in front of you and unobtrusively flip the pages while you're speaking. If you need more space for text, put sticky notes on the back of the preceding page with more visual reminders.

I have delivered many webinars, in which I'm speaking on the phone from the comfort of my home office, displaying slides over the internet to attendees all over the world. Because no one can see me during those presentations, I can make the process easy for myself. I write rich notes for each of my slides in a conversational style, based on how I've given the talk live in the past. That way I can just read the notes, with appropriate vocal inflections and additional commentary relevant to that audience. The PowerPoint notes thus serve as a script, enabling me to give a natural-sounding presentation of repeatably high quality.

Presentation Tip #13: It's okay to say "I don't know" in response to a question

If you aren't sure how best to respond, it's better to say "I don't know" than to stand there silently because you can't think of the right answer. It's also better than making up an answer on the fly that might turn out to be wildly erroneous. Even better than a simple "I don't know" is "I don't know, but I'll find out," or "I'm not sure off the top of my head, so let me think about your question and get back to you." Then be sure to follow up later on.

Because you are controlling the presentation (see Presentation Tip #7), you may also choose to defer questions to the end. You might suggest that you follow up off-line with someone who's asking a complex question or one that's of limited interest to the rest of the audience. For reasons of time management, you could even decline to answer questions. But do show respect for serious questioners, even if you can't give them all a perfect answer in real time during your presentation slot.

Presentation Tip #14: Watch the clock

Speakers who run past their allotted time get dinged on their evaluations. This goes double if you're speaking just before a break, prior to lunch, or at the end of the day. Try not to run more than one minute past your scheduled finish time.

If you see that you might run out of time before you cover everything you planned to say, that's your problem, not the audience's problem. Skipping some material is much better than holding captive a fidgeting audience who would like to move on with their lives. With practice, you'll get better at selectively condensing your planned material while underway to bring the talk to a smooth close. Nobody enjoys seeing a speaker whir through 20 slides in the last five minutes.

Similarly, when you're teaching a class, start on time and resume promptly following breaks. I always tell people exactly how long the break will be, and I start right up at the appointed minute. If some people trickle back in late, that's their problem. I've been called a Time Nazi; I took it as a compliment. We have a lot of material to cover and I don't wish to be constrained by the last person to return to the room. Once students appreciate that you are serious about staying on schedule, they'll come back on time.

I plan on spending an average of three minutes discussing each slide. I know one speaker who says he averages just one minute per (information-dense) slide. Particularly toward the end of his overstuffed presentations, he goes so comically fast that I've given up trying to follow him. While it is good to move along briskly, people can only absorb information transmitted at a reasonable rate. Flashing up a slide for only a few seconds is pointless if the audience gets nothing out of it.

Presentation Tip #15: Talk about what you said you were going to talk about

I firmly believe in truth in advertising, so I write abstracts for my presentations that are both inviting and accurate. The audience has a right to know what to expect, and the speaker has a responsibility to deliver. This tip might seem obvious, but I've attended more than one presentation in which the content didn't fulfill the promise from the title and abstract.

Let's say the title is "Conjugating Verbs in Swahili," but the material presented misses the mark. At the end of the talk the speaker invites questions. One attendee asks, "Were you going to say anything about conjugating verbs in Swahili?" The speaker doesn't know how to respond. He thinks that's what he just spent an hour discussing, but he really didn't. That's an embarrassing position for any speaker to be in. I've seen it happen, though fortunately not to me.

Presentation Tip #16: Don't be nervous if a lot of people attend your webinar

My webinars typically draw 800 to 1,200 registrants, although only about 40 percent of them attend. That's a fairly large audience. However, from the speaker's perspective, the experience of delivering a webinar is identical whether there are two attendees or two million. I'm just talking into the phone to whoever happens to be listening on the other end. The only difference might be how many questions I get. But I'm going to have only a certain amount of time for Q&A anyway, so I can answer just a few questions, no matter how many people submit them.

While it can be intimidating to think of your message going out to a lot of people at once, when you're giving a presentation over the web it really doesn't feel like there's a large audience out there. So don't let that faceless crowd daunt you the way it could if you were staring from a podium out over a vast sea of faces.

Presentation Tip #17: Remember that you're wearing a microphone

I have respiratory allergies that make it difficult for me to speak loudly for more than about one hour. Therefore, I always request that the client provide a wireless lavalier microphone when I teach a full-or multi-day class, or when I deliver a presentation in a large room. These microphones use a transmitter that clips to my belt. It's important to switch that transmitter off at breaks and at other times when I don't wish the entire audience to hear what I'm saying—or doing.

I once returned to a classroom after a break and noticed that some of the students were snickering quietly. I knew why. I had walked way down the hall to refill my water bottle and visit the toilet (in that order). As I was filling the bottle from the fountain outside the toilet, I noticed that my microphone was still turned on, so I quickly switched it off. Although I was quite some distance from the classroom, the microphone was transmitting just fine. My students heard the water coming into the water bottle and logically misinterpreted the sound. Hence the snickers. I don't know if they believed my explanation. Ever since that experience, I am super-careful to check that microphone transmitter switch before I leave the classroom and during class practice sessions.

You might also want to be cognizant of where you are standing when you switch on the microphone transmitter. At the very beginning of a class once, I just happened to turn on the mike as I was walking in front of a high-mounted speaker for the PA system. The feedback just about blew my head off. In a room that has speakers mounted in the ceiling, I sometimes have to walk around a bit to find spots to avoid feedback. Being a public speaker presents no end of unexpected learning experiences.

I find these seventeen tips help keep me confident, comfortable, and poised when I'm speaking in public. I'll bet they'll help you too.

Next Steps

- List the aspects of public speaking that make you the most uncomfortable. Consider whether any of the tips in this chapter can give you more confidence about giving presentations.
- Review the slides for the various presentations in your portfolio to see if any of them contain excessive or unreadable quantities of text. Can you condense that text or replace any of it with figures or other visual elements? Make sure the fonts used on your slides are easily viewable, even from a distance.
- What aspects of public speaking (or listening) do you find most enjoyable? Try to think of ways to structure or build content and activities into your presentations to yield more of those pleasurable moments.

ABOUT THE AUTHOR

Since 1997, Karl Wiegers has been Principal Consultant with Process Impact, a software development consulting and training company in Happy Valley, Oregon. Previously, he spent eighteen years at Eastman Kodak Company, where he held positions as a photographic research scientist, software developer, software manager, and software process and quality improvement leader. Karl received a PhD in organic chemistry from the University of Illinois.

Karl is the author of the books *Software Requirements, More About Software Requirements, Practical Project Initiation, Peer Reviews in Software*, and *Creating a Software Engineering Culture*. He has written some 200 articles on many aspects of software development and management, chemistry, and military history. Karl also is the author of a forensic mystery novel, *The Reconstruction*, and a memoir of life lessons titled *Pearls from Sand: How Small Encounters Lead to Powerful Lessons*. He has served on the Editorial Board for *IEEE Software* magazine and as a contributing editor for *Software Development* magazine.

Several of Karl's publications have won awards, including *Software Development* magazine's Productivity Award (*Creating a Software Engineering Culture* and *Software Requirements, 1st Edition*) and the Society for Technical Communication's Award of Excellence (*Software Requirements, 3rd Edition*).

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