"I wish this book had existed when I first went independent. It would have saved me from a lot of mistakes." —Mike Cohn

GOING IT ALONE

Essential Tips for the Independent Consultant

Karl Wiegers

Praise for *Going It Alone*

I wish this book had existed when I first went independent. It would have saved me from a lot of mistakes. Even now, twenty years after first going independent, I learned a few things. Each chapter in Karl Wiegers's *Going It Alone* is full of powerful advice, most of it from Wiegers himself. But he's also wisely included chapters from experts on specific topics. If you are a newly independent consultant or are contemplating it, *Going It Alone* has the advice you need to succeed.

—Mike Cohn, Co-founder of the Scrum Alliance and the Agile Alliance

I've looked to Karl Wiegers for business guidance for many years, and I'm thrilled to see him share these ideas in this interesting, practical, and to-the-point book. Many consulting books are a bit ho-hum to read, but this one kept me turning the pages. I'm not an independent consultant, but this book's breadth of topics reaches well beyond that audience. Whether you are a consultant, business owner, aspiring leader inside a professional services organization, or budding author, you will find value here.

—Joy Beatty, Vice President of Research and Development at Seilevel

I've read most of the consulting books recommended in *Going It Alone*, and they are all as good as suggested. What makes *Going It Alone* stand out from the others is that Karl Wiegers and his colleagues easily cover the broadest landscape of issues that you may encounter as a consultant and provide practical, down-to-earth advice to navigate these issues. Even after consulting for fifteen years, I picked up a handful of valuable tips for future use!

—Jim Brosseau, Clarrus Consulting Group

This book captures in a very readable way a collection of lessons learned from Karl's years of experience and from the experience of others. I find two of the techniques described here to be especially helpful—not only to novices, but to those of us who've been doing independent consulting for decades. The first is the use of checklists, a simple but very effective way to avoid mistakes. The second is a collection of business rules (or policies, as he also names them), a pithy collection of lessons you won't have to learn the hard way. In addition to these two notions, there is a wide range of other advice on topics that will help make you a successful speaker, advisor, and author—enjoy!

—Dr. Joyce Statz, Independent Consultant in Business Analysis and Process Improvement

A singularly lucid and entertaining guide to the full lifecycle of working as an indie consultant. No one considering leaving the dark side of corporate employment should make the jump until they have read this book—twice. It will save you unimaginable grief.

—*Gary K. Evans, Agile Coach and Use Case Expert*

Simply put, this is the book I wish I'd had available to me when I started consulting. I had never had to market my services, bid against competitors, incorporate my business, negotiate deals with partners and clients, or protect my intellectual property. I learned the hard way. *Going It Alone* distills those hard-earned lessons so you don't have to. It took me years to figure out how to leverage my work through passive income; Karl devotes a large section to it. It almost seems unfair: he lets the reader in on the secrets that took the rest of us a lot of pain to learn. The book provides valuable advice on pretty well everything that touches on the consultant's life, from how to work with partners, to what to cover in contracts, to the more philosophical questions of consulting like balancing life and work. If you're starting out on your own, you couldn't do yourself a better favor than reading this book.

—*Howard Podeswa, CEO Noble Inc., author of* The Business Analyst's Handbook

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http://www.processimpact.com/going_it_alone/index.html

Contents

Introduction

I have been self-employed as a software development and process improvement consultant since early 1998. I began doing this sort of work even earlier, while I was still working for a large corporation. This book is based on my Consulting Tips & Tricks blog, which I launched to share some of the insights I have accumulated over the years. I wish I had had a resource like this available when I was embarking on my consulting career.

Even if you don't work in information technology, you're sure to find a lot of information in this book that applies to being an independent consultant in other fields. And even if you aren't an independent consultant at the moment, you'll discover many useful tips about giving presentations, writing for publication, and working with others. My examples are drawn primarily from my personal experience in the software world. However, you can readily adapt the ideas and actions I suggest here to your own domain.

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. For several reasons, I moved into software development at Kodak full-time in 1984. Six years later I took over as the manager of the small software group I was in.

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. Ultimately I took a position leading software process improvement efforts in one of Kodak's digital imaging technology areas. Shortly before I left the company, I was guiding process improvements in Kodak's web development group, the people who bring you kodak.com.

In the early 1990s I began giving presentations at conferences, while I continued to write magazine articles about various aspects of software development and management. In 1994 I received my first invitation to speak at another company on some of the work I'd been writing about. More such opportunities quickly arose, thanks to my increasing visibility as a conference speaker and author. Soon I was providing consulting and training services for other companies on my vacation time, while I still worked full-time at Kodak. This was all done with my management's knowledge and approval. It was a safe 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 and author asked me 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 own 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 for me.

Being self-employed

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

This book is based primarily on my personal experiences while being self-employed. Several other consultants also contributed chapters to share their experiences and perspectives. Many of these tips also apply to people—sometimes called consultants—who are engaged in staff-augmentation contracting relationships as temporary corporate employees. Some of our topics might not be as important to consultants who are employed by larger companies rather than being on their own.

I learned several things about consulting early on. First, I was fortunate to get much more work than I thought I might. That was a relief, as many new consultants struggle to stay afloat. Second, I discovered 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-man shop has suited me well. And third, I found that there's a lot to learn about being a self-employed, self-managed consultant.

Casting a large net for knowledge

When I told my colleagues at Kodak I was going to leave and give consulting a shot, someone asked me 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. I didn't have to make every mistake and climb every learning curve myself. Everyone I encountered at a client site, conference, or professional society meeting was a potential source of knowledge.

Gaining access to a wide variety of companies was far more educational than working inside a single microcosm with people steeped in the same corporate culture. It let me collect a breadth of information so I could recognize patterns of both effective practices and common problems. Then I could share that accumulated knowledge with others, for a very reasonable price. I'm pretty good at synthesizing knowledge from multiple sources, packaging it, and delivering it to others in a practical way. That's the essence of being a consultant.

There was another unobvious aspect regarding the knowledge you can—and 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 requirements engineering 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 the ones who either aren't even aware that they have problems with requirements or don't opt to address them. That insight taught me that it's hard to sell a better mousetrap to people who don't realize they have mice.

How the book is organized

This book contains thirty-three chapters grouped into six parts. Part 1, "Setting up Shop," addresses laying the foundation for your consulting business, including letting the world know you're available and 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.

Part 2, "On the Job," covers many realities 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, my concept of the ideal client, and some warnings about clients who can cause headaches for you and how to deal with them.

In Part 3, "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 address establishing business policies and the important topic of purchasing appropriate insurance coverages.

Your business will probably start out a bit slow, leading you to look for ways to grow it. Part 4, "Building the Business," provides suggestions about how to do this. I 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 offer suggestions for landing both new and repeat business, along with some comments on participating in professional organizations.

Although I've always called myself a consultant, most of my independent work has involved delivering training. Teaching classes and making presentations are common consultant activities, so Part 5, "Media Matters," offers many tips for delivering effective presentations with confidence. It also describes ways to leverage your intellectual property repeatedly through different media formats, as well as addressing some important issues of copyright, fair use, and managing your valuable intellectual property.

Written communication is a core skill for any consultant. Hence, the book closes with Part 6, "Writing Your Way to Success." Publishing is a way to simultaneously share your knowledge with the world and market your expertise. 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 just 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 6.

A supplemental web page to accompany this book is provided at https://tinyurl.com/goingitalone. It lists several other books on consulting that I've found helpful. It also provides links to numerous useful items described in these pages, including sample templates for client agreements, book proposals, checklists for your consulting activities, and a list of collaboration tools for remote consulting.

Some caveats

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

Also, you might conclude that certain approaches I've found to be valuable are a poor fit for your situation. In that case, it would be silly to take my advice. Instead, look for the idea behind each recommendation here and 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 to 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. There's so much 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 IC1704 for the fourth invoice I submitted to client InfoCorp in 2017.)

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, I'm confident you'll find plenty of information here that will enhance your own professional capabilities.

Chapter 10

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 kinds of problems I've encountered so you can be alert for those in your own work as a consultant.

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 17, "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 could not get the company to pay me. It wasn't a trivial amount of money, either.

After multiple requests, I finally received a check. The check required the signatures of not one but two of the company's officers, yet no one at all had signed it! I'd had it. In a pretty sour mood, I called the company's president. A check for the full amount—signed, no less—arrived the next day. 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 some 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. I will no longer ship a product to a purchaser outside the U.S. along with an invoice. Instead, I must receive payment before I will deliver the product. It's a shame that a very few people make life more difficult for everyone through their irresponsible actions.

I've occasionally had problems with delayed payments when a client required me 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 didn't pay me on time and wouldn't 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. This kind of income uncertainty is just one of the factors you need to get used to as an independent consultant.

I think 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 as a subcontractor again, and I'll never work for that client again.

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

Firing a client

When I worked at Kodak before I went independent I helped plan our internal software engineering conference one year. We had a speaker in mind for a keynote presentation, a well-known figure in a particular area of software engineering. However, one of the planning committee members reported that that consultant had had some previous unpleasant experience with Kodak, and 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 realized that some clients simply aren't worth the trouble. I've had 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.

Obviously, if you need the income and the opportunity presents itself, 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 very 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 delight, he got paid right away. Wouldn't it have been easier for everyone if they had just paid the bill as promised? My friend refused to do any further work with that client. Coincidentally, I've had so many problems with that same well-known company 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 than I thought was reasonable to pay me, I decided to establish a new policy. Rather than invoicing a new client after I deliver a training course 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'm there 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 16, "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, I would be doing something different after I arrived 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. I suppose I could even get sued.

There are a lot of gray areas when it comes to integrity. But if someone clearly asks you to lie about work that you do, that's pretty 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.

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 prospective client who's looking for 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 client to another consultant who's a better fit for their needs. Similarly, I'm grateful when other consultants point clients towards me.

I neither pay nor accept finder's fees for these sorts of referrals. 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 friend of mine whom I'll call 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'd better not be any rage directed at him. The relationship worked for a while, but then Peter became viewed as a threat by a particular manager. 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 no, 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. 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 emails that apparently came from his email address. Somehow, that seemed fitting.

Chapter 25

Twelve 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 or any other organization that helps you become comfortable speaking before an audience. Nonetheless, I've delivered well over six hundred presentations in the past twenty-five years and enjoyed just about all of them. Somehow, I have become comfortable speaking for anywhere from thirty minutes to four days, to audiences ranging from just a few people up to eight thousand.

Most consultants will be called upon to give a presentation or teach a class from time to time. Speaking in public is one of the most terrifying experiences for most people. That fear even has a name: glossophobia. The anxiety is understandable. Everyone is staring right at you, eagerly 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 the idea of giving a presentation, in this chapter 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.

Presentation Tip #1: 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 the talk. 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.

Presentation Tip #2: 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.

Presentation Tip #3: 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 deliver a presentation at a conference and recognize a well-known authority on the topic in the audience. 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 my area 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 and listen.

Rarely, I have seen a famous person take an inappropriately intrusive role in someone else's presentation. I find that highly 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 #4: You rarely face a hostile audience. Most people 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. 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 material.

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

I opted for this approach the very first time I gave a keynote, at a software process improvement conference with some eighteen hundred attendees back 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 for increasing quality and productivity. What we lacked was the effective and consistent application of those established techniques. So I was encouraging people not to develop any more new models just then, but rather to work on reduction to practice of what we already knew worked.

This was somewhat provocative because the organization that sponsored this large conference had led the development of many of the models about which I was saying "Enough!" When I reached the podium, I was slightly taken aback to see the man who began this whole improvement-model movement sitting in the very front row. I had never met him, although of course I knew his work. He didn't say anything during the presentation (see Presentation Tip #3), 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 conference agreed, but my keynote certainly did stimulate discussion that went on for the duration of the event. That was my goal.

Presentation Tip #5: Avoid saying "and on the next slide…" I learned this tip from my thesis advisor in graduate school. Maybe you don't remember just what's on the next slide, or you changed the sequence from the last time you gave the presentation. When we used actual 35mm slides decades ago, they might not have been loaded in the slide carousel exactly as you 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 #6: 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). Reveal elements of the slide, such as bullets or graphics, one at a time, instead of showing an entire complex slide and then leading 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 so they're visible when you flip to the next notes page.

I have presented many webinars, in which I'm speaking from the comfort of my home office over the phone, displaying slides through the internet to attendees all over the world. Because no one can see me during those presentations, I can make the presentation process easy for myself. I write rich notes for each of my slides in a conversational style, based on how I have given the presentation 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 #7: It's okay to say "I don't know" in response to a question. If you aren't sure how best to respond, that's better than standing 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 make sure you follow up later on.

Because you are controlling the presentation (see Presentation Tip #2), you can 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. And 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 #8: 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 likes seeing a speaker Rolodex through twenty 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.

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 fast that I've given up trying to follow him. While it is good to move along briskly, people can only absorb information at a certain rate. Flashing up a slide for just a few seconds is pointless if the audience gets nothing out of it.

Presentation Tip #9: Be sure to 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 accurate and inviting. The audience members have 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 where the content delivered didn't fulfill the promise from the title and the 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. She thinks that's what she just spent an hour discussing, but she really didn't. That's an embarrassing position for any speaker to be in. I've seen it happen, fortunately not to me.

Presentation Tip #10: 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 fifty 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 myself 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 presentations 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 class going on there. With some effort, I learned that the 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 showed up 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 informed me. I only had 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. If she hadn't 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 no one had informed me. A student in the class wandered by the reception area and recognized me, so I made it to the room eventually. This is pretty frustrating. And the three contact people for whom I left voice mails never replied to me at all. Weird.

Presentation Tip #11: 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 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 you use. 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 conferences where I'm speaking losing my materials. I always turn in my materials for duplication well before the deadline. But 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 that 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 they all look fine. But when I arrived at the conference site, a different staff member asked me, "Did you bring your handouts with you? We never received the materials for your tutorial."

I was pretty ticked about this. I explained the background situation and 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 my file. It opened up and displayed correctly.

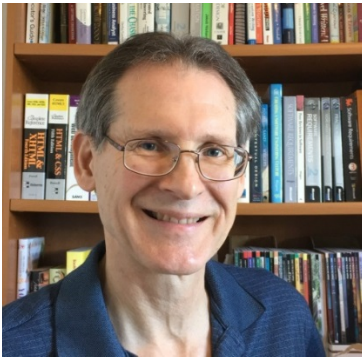
"What more do you want from me?" I asked with annoyance. How frustrating that was, particularly because I had so carefully followed up after my multiple previous problems. Fortunately, they were able to get the materials printed and delivered to my room only a half-hour late. I never delivered a tutorial at that conference again. They just weren't worth the hassle.

Presentation Tip #12: Don't be nervous if a lot of people attend your webinar. My webinars typically draw eight hundred to twelve hundred registrants, although only about 40 percent of them attend. That's a pretty large audience. However, from the speaker's perspective the experience of delivering a webinar is identical whether I have one attendee or one 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 you get. But you are only going to have a certain amount of time for Q&A, so you can only answer a few questions anyway, 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 live audience.

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

About the Author



Karl Wiegers has spent the past twenty years as 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 also written more than 180 articles on many aspects of software development and management, chemistry, and military history. Karl has served on the Editorial Board for *IEEE Software* magazine and as a contributing editor for *Software Development* magazine.

Karl's most recent book is a mystery novel, *The Reconstruction*. He's also the author of a memoir of life lessons titled *Pearls from Sand: How Small Encounters Lead to Powerful Lessons*.

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

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