



CPENATION

# **15 Tips on Becoming a Great Consultant**

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Sheila Shanker, CPA



## **15 Tips on Becoming a Great Consultant**

### **OVERVIEW**

#### **INTRODUCTION**

This interactive self-study course is a simple and useful guide designed for financial professionals including, but not limited to, CPAs, accountants, financial professionals, and IT professionals. The course provides an overview of the non-technical issues that are important to any consultant with practical considerations and ideas that can be used for any consulting project. To complete this course and receive credit, you must read the material and, during the course, to test your comprehension of each of the learning objectives, answer the review questions. After completing each section's review questions, you can evaluate your progress by comparing your answers to both the correct and incorrect answers and the reason for each. Once you have read all of the materials and completed the review questions, fully understanding the correct and incorrect answers, you can complete the final examination, of which you must score a 70 percent or higher in order to receive CPE credit.

#### **AUTHOR**

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#### **COURSE DESCRIPTION**

This course provides a basic overview of the skill set required to become a top consulting professional. The course is designed to assist with developing and/or refining consulting skills. The course contains 5 chapters, and each one presents three tips to improve one's consulting abilities, with the goal of an increase in overall competence as a consultant.

#### **TOPICS COVERED**

- Competence and Experience
- Communication Skills
- Leadership
- Problem Solving Skills
- Personal and Professional Integrity



## **FIELD OF STUDY**

Communications

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***Please Note: This course must be completed within 1 year of date of receipt of the course for CPE credit.***

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## LEARNING OBJECTIVES

### Chapter 1: Competence and Experience

Completion of this chapter will enable you to:

- Identify a “guru”.
- Recognize discretion.
- Outline the differences between confidence and arrogance.

### Chapter 2: Communication Skills

Completion of this chapter will enable you to:

- Identify proper questions to ask.
- Outline effective listening skills.
- State diplomatic abilities.

### Chapter 3: Leadership

Completion of this chapter will enable you to:

- Identify original thinking.
- Define your strategy.
- Recognize the importance of trust to a consultant.

### Chapter 4: Problem Solving Skills

Completion of this chapter will enable you to:

- Identify the advantages of fast learning.
- Recognize good judgment.
- Outline the requirements for excellence in your work.

### Chapter 5: Integrity

Completion of this chapter will enable you to:

- State behaviors related to honesty.
- Identify what “B.S.” is and how to avoid it.
- Recognize transparency.

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## CHAPTER 1

### COMPETENCE AND EXPERIENCE

Completion of this chapter will enable you to:

- Identify a “guru”.
- Recognize discretion.
- Outline the differences between confidence and arrogance.

#### INTRODUCTION

Great consultants possess the education and experience necessary to do the job. Having a strong core competence is one of the keys to success. This means to be specialized in a specific area, an industry, a process, or a software program. Usually school alone doesn't give consultants the savvy they need to do a great job. Showing some mileage, i.e. experience, can only help. The three important aspects of competence and experience are: be the guru, be savvy in sharing experience and be confident, not arrogant.

#### BE THE GURU

A guru is an expert on a subject matter. As a specialist, a guru knows more than most people do about a certain area.

Few consultants succeed as generalists. Specialize. It is what separates you from other consultants. There is nothing wrong in being a generalist with a special skill. You can see the forest, while paying attention to the trees. However, be aware that the specialty will take you further. Usually clients look for consultants with certain skill sets—those not found within their ranks. A specific expertise is much more valued over general knowledge.

Keep up with current events in the area in which you are the guru. Things change at an amazing pace, so plan on always being current on what interests you. This means going to conferences, subscribing to professional magazines, attending webinars, and enrolling in classes.

Solidify your guru status by teaching, writing articles or white papers, or writing books on the subject you're specialized in. Maintaining your status of guru is no

simple matter—be busy and visible with your professional organization. You want people to know the areas you excel at and what you're working on.

Your goal is to be the first person to come to someone's mind when he/she knows about an opportunity that fits your guru skill set.

Just a note: Don't bring basic books to the consulting workplace, unless you wrote them. If you need to refer to a book, leave it in your car. If you're the guru, you shouldn't need to consult books that contain basic knowledge.

### **SHARE EXPERIENCE DISCREETLY**

People hire you as a consultant to offer new ideas and “fresh eyes” on existing issues. Not only do you have to know your stuff, but also you have to look at situations with a critical eye. If you know a better way of doing something, share that. If you know that there is something better out there, share that information. The more experience you have, the more you can offer in this area.

Sharing experience and giving advice on how to do something better can be tricky. Great consultants share experience without identifying the client. If you spill the beans about another client, you lose credibility fast. First, you betray the confidence of one client, and you're likely violating a confidentiality clause in your contract as well. Then you prove that you have a loose mouth and easily could betray the current client the same way. This isn't pretty, and it isn't professional.

Don't assume that by bad-mouthing another business, even a competitor, you're bonding with the client. You're not. Stick to general, well-known facts when naming names, and keep to no-names when talking about details. Be nonspecific about details, so that the client cannot be identified. Don't try to show off by sharing private information. It is tacky and a sign of immaturity.

A good way to handle this situation is to talk about “a client,” “a business,” or “a nameless organization.” If pressed for names, smile sweetly and say that it is confidential.

### **BE CONFIDENT, NOT ARROGANT**

Many times consultants are called in to advise and provide direction. Do not let this go to your head. Do not become an obnoxious know-it-all. People are eager to listen to someone's wisdom and proven expertise. However, if you start putting



them down, showing how shocked you are, or how messy it all is, you'll not last long.

Find your own style of showing confidence without displaying contempt and arrogance. When you're flippant, people will shut you off. You're at a client's office to provide a service, and if your arrogance gets in the way, you're out of the game. Condescension is not appreciated.

Arrogant people interrupt others and are sure that other people have nothing to say that has value. Unfortunately, this is a common issue with consultants. If you feel you have fallen into this trap, make fun of yourself and keep things light. When you are confident, you don't need to be arrogant.

Being nice to the boss only is bad form. People talk. If people complain enough about you and your arrogant attitude, you are unlikely to be at the project for too long. Even though you are valued because of your expertise, it doesn't mean that you're superior. The client is paying for your services. When you cannot get along with "subordinates," someone else will be called in that can get along and do the work that needs to be done. People hate a "show off," even with substance. Treat everybody with respect—that's what great consultants do.

## CHAPTER 2

### COMMUNICATION SKILLS

Completion of this chapter will enable you to:

- Identify the proper questions to ask.
- Outline effective listening skills.
- State diplomatic abilities.

#### INTRODUCTION

Consultants don't work in a vacuum. As with most professionals, they need to interact with clients at various levels, co-workers and other interested parties. Good communication skills are necessary to any great consultant. Effective communication for consultants involves asking questions, listening and being diplomatic.

#### ASK QUESTIONS

Consultants should ask questions, take notes, and not make any assumptions. When you're a consultant, you're supposed to know your stuff, but you're not supposed to read minds or to make wild guesses. It's part of the game to ask good questions and not make assumptions that may turn out to be false.

Beware that asking questions starting with "why" can cause defensiveness. People don't like to be asked why they do something, even if (especially if) it makes no sense. Instead, ask questions starting with "what" or "how." Questions such as, "What if we do this or that?" or, "What do you think if we do this?" provide a more effective approach. You could also make a statement and then ask, "Am I right?"

There is a difference between asking good questions and being annoying. Ask relevant questions, showing you have a firm grasp of the basics.

You could write your questions and then set up a meeting to talk about them. Or you could email questions when the answers are "yes" or "no" or really short. Ask your clients how they prefer to handle your issues. Do not interrupt people when they answer the questions. Be extra polite.

Stay focused. Stay on topic. Don't ask questions that are "gossipy," such as "Ms. A told me this, and I was so shocked to hear about it. What do you think is going on?"

Avoid adding anxiety or stress in your questions. You want to get information, not panic people. Avoid asking direct questions about people's jobs, unless they specifically relate to your role as a consultant. Since their biggest fear is losing their jobs to others, employees do not trust outside consultants. Be aware of this common situation, and be tactful and sensitive.

### **BE A GOOD LISTENER**

Consultants need to be good listeners to succeed. As mentioned in an earlier chapter, arrogant people are not good listeners. They interrupt and belittle. You don't want to be one of those people.

When people talk, make comments, look at them, and acknowledge what is being said. When you feel uncomfortable with direct eye contact, look at the nose of the person instead. People cannot tell the difference.

Avoid distraction, such as texting someone while listening. Avoid answering e-mails while listening. Your full attention is what you provide to another person.

Not all that is said is important to you and your project, so you need to know how to filter information. Listen and observe. Use the time to build rapport with people and take notes if needed. When something is not clear, repeat what you heard in your own words and ask if you're right. Nod your head and use body language, so that the person knows you're paying attention. The point you want to convey is that you're there to learn and help. Use listening skills to communicate your interest in the matter being discussed.

Complaints are to be considered carefully. They are usually clues as to what is really going on, pointing you to the right direction. Many times people note that something is amiss, but cannot identify the real cause of the problem, and usually that's why you're there. Look for what is behind the complaints and what part of the process is off—don't point fingers at people and start a blame game. Don't start or feed any drama or hysteria.

Instead, reviewing processes should be your main concern, rather than concentrating on personalities. For example, if bills are being lost on a regular basis, focus on what happens from the time a bill arrives at a company. Follow the

process involved. Focus on processes, practices, steps, and paper trails first. More likely than not, the process needs to be changed, and it is not a personnel issue.

### **BE DIPLOMATIC**

Be very aware of your role in each consulting project. You're a guest and not a permanent employee. Don't assume that you will become permanent, or that you're more than what you are. **STAY AWAY FROM DRAMA AND POLITICS.**

As with any gracious guest, you should avoid picking up fights. Mocking yourself may be a way to break the ice and to get people to be less defensive. A healthy sense of humor is a major plus. However, never make fun of clients' employees, which can be easily misconstrued.

Represent your firm well (even if the firm is your own self). You could dress a notch above the rest of the people. As your image is important, present maturity and professionalism at all times. Keep your eye on the ball—what is your goal? Can you lose some battles and still win the war? Don't be dragged into endless arguments.

Talk to your consulting firm's representative if your work is significantly different than what you're originally presented. Remember: You're an outsider. Sometimes clients may want you to do work more suited to an insider. The consulting firm should be notified of what is happening. You don't want to be involved in situations where you may need to get a lawyer to represent you down the road. When you become involved in a fraud situation, Human Resource issues, or other matters with high risk, you may want to step away and not take or continue the engagement.

When you're wrong, acknowledge that, apologize when appropriate, and take ownership of your mistakes. Recognize the error and correct it right away. Taking responsibility over your work—both successes and failures—will make you more credible and mature. Blame games are to be avoided.

Instead of blaming others, consider dealing with "miscommunications." It accomplishes the same thing, and it is more diplomatic. Either way, document your work as much as you can.

Remind yourself often that you're not an employee; you're a guest and you want to be perceived as a gracious visitor. You come in to do a project and you leave smelling like a rose.

## CHAPTER 3

### LEADERSHIP

Completion of this chapter will enable you to:

- Identify original thinking.
- Define your strategy.
- Recognize the importance of trust to a consultant.

#### INTRODUCTION

Great consultants are leaders. Besides offering knowledge and experience, consultants need to be convincing. They often need to persuade others of better ways of doing business. Under the leadership umbrella, three items are of importance to a consultant: to think originally, strategize and build trust.

#### THINK ORIGINALLY

Consultants do not get paid to agree with the status quo. There is a reason for a company to call in consultants: They want to do something differently, or they want help in a situation they cannot handle by themselves. Clients need people who are independent and who can think for themselves.

Avoid becoming the annoying “bubble-head doll” agreeing with what is being said all the time. Instead, provide fresh input to a problem or a process. When you know that something worked better in similar situation, share the information. It's probably new to the client.

Please, no clichés. No “empowerment,” no canned stories. You're expected to give clients solutions to problems—innovative answers. Many times the problem is not what it seems to be. Consultants are supposed to find out what the actual issue is and not take the client's word as gospel. As you research what the real culprit is, your originality pays off big time with the client.

Original thinking is about creativity. And what is creativity? It is the ability to create something new. It is when you see a situation and you relate that to something else, creating something new in the process. “What if” thinking can help you come up with new ideas and lead to original thinking. For example, what if we cut off step B and go straight from A to C?

Many consulting firms and consultants have their own methodology. Having a methodology doesn't mean that you cannot have an original thought. They both can be combined to maximize your impact to the client.

Original thinking involves risk. People may not see your ideas as feasible or worthwhile. You may need to explain and convince people of your thoughts. It comes with the territory of being a leader. People are paying to rent your brain, including new ideas and fresh concepts.

### **STRATEGIZE**

Per the Merriam Webster dictionary, one of the definitions of strategy is "the art of devising or employing plans or stratagems toward a goal." Leadership is about having a goal and moving toward that goal. It is about having a plan to move from point A to point B. What is a good strategy to deal with a problem? What is the best approach to get XYZ done? Each situation is different, but the ability to plan is always there.

Great consultants must be flexible and able to negotiate solutions with clients and third parties. Maybe what has been proposed cannot be done. Then you need to ask what components can be done and what makes sense.

In order to go from point A to point B, you must know what A is. To know where you want to be, you need to know where you are. That is called "baseline." Your first strategic step is to know where you are. What is really happening here for this to be the way it is?

The next step is to have a clear goal: point B. What can be reasonably done about the problem? How to go from baseline situation to the goal- point B? Many consultants put their ideas and plans in writing on a timeline to help in controlling the work progress. Project management software helps in determining the stages and the timing of such stages.

Usually there are steps to go from A to B. What can be done with available resources? Should you request more people so that you get to your goal in time? Should you move people around to accomplish XYZ faster?

You need to be strategic to succeed and be able to accomplish goals, especially if the goals are long-term. Without a workable plan, targets may go out of focus and become hazy. As a leader, you need to bring people back into the main issues in a project and strategize your success with others.

Consider how to get a project done, while you have another one starting up. What is the plan? You may not be able to leave and start the other project full-time. You need to strategize all project exits. Remember that you're a leader.

### **BUILD TRUST**

A leader inspires trust. And trust is required in any project. When a consultant is not trusted, any ideas he/she has will be met with skepticism and defensiveness. You can have the best idea ever, but if people don't trust you, they will think twice before agreeing with you or adopting any ideas.

As mentioned earlier, people are concerned about consultants getting their jobs or jeopardizing their employment situation. In order to earn trust, a consultant needs to be open about his/her goals. Be vocal about it. Say that you're not interested in that person's job. Be upfront about this topic.

You build trust by acting competent. Show by your actions that you know what you're doing. You make promises and you fulfill them. You are dependable. If you say that task A will be done by the end of the week, then this task is done at that time or earlier.

Another way to earn trust is to make sure people know that your motives are not self-serving. Your behavior should not betray this principle. Your main concern is what needs to be done to accomplish your project goals and nothing else. When a consultant's real intention is to get a job with the client, it's often obvious, even if the person tries to conceal it.

Conducting yourself as a professional, you manage expectations. When you cannot achieve a result by the expected time, you say so well before the deadline. Ongoing updates of your work are comforting details to clients.

Don't make phone calls or answer e-mails unrelated to the client when you're at a client's site. When you must contact someone, use a cell phone and be discreet. People talk and they will talk about you being paid to conduct unrelated business. This is not the type of image you want to have.

On the same subject, don't conduct personal business when you're working with a client. Establish boundaries between your personal and business worlds. If your child calls you every hour, you have a problem. You could give prior notice if you need to be on a long phone call that has nothing to do with the current work, or

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when you need to leave early for an appointment, You don't have to, but doing so shows courtesy and maturity, helping you earn trust.



## CHAPTER 4

### PROBLEM SOLVING SKILLS

Completion of this chapter will enable you to:

- Identify the advantages of fast learning.
- Recognize good judgment.
- Outline the requirements for excellence in your work.

#### INTRODUCTION

Consultants are usually engaged to resolve a problem. Something needs fixing, and a consultant is called in. Great consultants are great problem solvers. To solve problems, consultants need to be fast learners, use good judgment and operate at a very high level.

#### LEARN FAST

As a consultant, you don't have the luxury of training. There is no time. The expectation is for you to perform like a pro in minimal time. Asking questions, listening, and observing are ways to assimilate the situation and to function at peak performance. This is not typical academic learning. It's live. It's on the spot, learning without a textbook or a teacher.

Once you arrive at a client's site, absorb your surroundings like a sponge. Use the Internet to check out the client. Look at any reports they may have, as well as brochures and press releases. Take care of your health for optimal fast learning. Eat well, exercise daily, and take short breaks.

If you're not tired after your first days on a new assignment, you're likely not learning fast enough. You should be making so much effort in catching up and learning that you should be tired at the day's end. Many great consultants are wiped out the first few days of a project. It is actually a good sign. Take your vitamins.

Determine what you can do to bring in the earliest results. You could deliver a report, a model, or an update quickly. Show that you can learn, work efficiently, and deliver fast results to the client. Clients are comfortable when they get something of tangible value early on in the engagement. Once you have proven that you can do the job and do it quickly, clients usually relax, and some of the pressure is off.

## **DEVELOP GOOD JUDGMENT**

*As one sage said, "Judgment develops from experience. Good judgment develops from bad experience."*

Good judgment is necessary to resolve any problem. It is also known as "common sense." Consultants must have good judgment to figure out what is important and what is not. It's too easy to go into tangents that are not relevant to the project. Consultants must have good judgment in dealing with people as well. For example, if someone is busy at meetings, unless it's an emergency, it's better to wait it out and instead work on another task.

Judgment is about having enough experience to see the good, the bad and the ugly. The more experience a person has, the better judgment that person is likely to have. Better judgment means better problem solving skills and better decisions.

A way to improve judgment is to reflect upon results and learn from one's mistakes. Don't make the same mistake twice. Learn from someone else's mistakes. You could take your mistakes as steps to develop better judgment next time around. The idea is to learn and move on, not to keep beating oneself up because of the errors made.

Another way to acquire good judgment is to learn to predict outcomes. Learn to see patterns in the work-life. Situations may be different at one level and the same solution may not work in all cases. However, soon enough you will see patterns develop. Based on patterns, you can foresee outcomes, and you can avoid bad ones early on.

## **STRIVE FOR EXCELLENCE**

When on an engagement, do your best all the time. Show the client great work consistently and don't settle for less. If you can go the extra mile, do so. Focus on what you do best and do it with pride and enthusiasm. Since mediocrity is not acceptable, you should not take shortcuts, as they will affect the quality of your work.

Don't spend time thinking too much. Spend more time "doing" instead. By doing, you're discovering new information and new facets to the work. Thinking that is repetitive and circular gets you nowhere except to give you a headache.

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To show excellence in your work, you need a sense of urgency. Not panic, but the sense of urgency—you need to do something meaningful fast. If you don't have deadlines, make them up for yourself. Do today's work today, not tomorrow.

Set up daily goals and achieve them that day. Stay on track. It is too easy to waste time chatting or complaining. Use a day-planner to chart your days and weeks. If you find yourself becoming part of the client's drama, step back and go back to your work.

To be your best, you really need to be organized. Nobody likes to see people shuffling around and looking for papers all the time. This is especially true of consultants. Make sure you have office supplies, folders and a place to put your work in. Disorganization is annoying and a time waster. Be as organized as you can. Create a folder in the computer you use to maintain your work. Don't forget to back up/save your files!

Since you never know what a client will throw at you, be committed to your daily goals, and at the same time be flexible. When something unexpected comes up, you could tell the client that you were planning to work on X, but this new item will take precedence. The point is to let the client know that you are organized and professional. Below are some good websites for inspirational quotes to help you maintain the drive for excellence fresh in your mind:

[http://humanresources.about.com/od/inspirationalquotations/a/quotes\\_excell.htm](http://humanresources.about.com/od/inspirationalquotations/a/quotes_excell.htm)

<http://quotations.about.com/cs/inspirationquotes/a/Excellence3.htm>

[http://www.finestquotes.com/select\\_quote-category-Excellence-page-0.htm](http://www.finestquotes.com/select_quote-category-Excellence-page-0.htm)

## CHAPTER 5

### INTEGRITY

Completion of this chapter will enable you to:

- State behaviors related to honesty.
- identify what “B.S.” is and how to avoid it.
- Recognize transparency.

#### INTRODUCTION

Consultants must have a high degree of integrity to succeed in the field. Great consultants value their reputation and want to be perceived as people of integrity. Per a popular saying, *“Integrity is doing the right thing, even if nobody is watching.”* It is the core of who a person is. Integrity can be reviewed in three aspects: honesty, avoiding B.S. and transparency.

#### BE HONEST

According to the Webster dictionary, honesty can be defined as “fairness and straightforwardness of conduct.”

Honesty is indeed the best policy. Don't pad time-sheets with more hours worked than real hours. It's better to give away some time than to throw away your reputation. Don't pad expense reports either with fake expenses. Once you're caught cheating, your reputation is gone. Nobody trusts a cheater. If you cheat on time-sheets or on expense reports, what else do you cheat on? What else are you going to lie about? Don't go there. It is not worth it.

When you're off the clock, make sure that the client knows that. Be clear about your billing practices. Before you engage in any major overtime, notify the client about it, even if you don't have to. Giving clients a “heads up” about your time is a good practice.

Consultants should be honest about their capabilities. If you don't have experience or expertise in a certain area, be direct about it. It may seem easy to wiggle in an assignment by being less than honest about one's skills. Often enough, however, this approach backfires, with the end result not being up to standards and the consultant losing credibility and referral opportunities.

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Consultants must be honest with the advice they give. For example, if you are affiliated with a software company or an insurance company, be open about the relationship and do not let that change your advice or recommendations. Avoid telling clients to do or buy something because you're going to get a commission on the deal. Be honest and objective.

Avoid conflicts of interest, or even the appearance of conflict of interest in your conduct with clients. This protects your image as a professional. You don't want anybody questioning your integrity.

The other area where honesty is important is the way consultants deal with each other. Bad-mouthing another consultant to a client or third parties doesn't make you look good or honest—just self-serving. Don't steal clients. If you have a reputation for stealing customers, you'll never be trusted by other consultants. Your reputation within your own professional group will be tarnished, and you'll miss good working opportunities, since consultants refer other consultants to projects often.

### AVOID “B.S.ING”

B.S. can take you only so far. You really need to have substance. Flash and theatrics can be impressive, but you need to have ideas and to perform at a very high standard. Before opening your mouth, ask yourself: Is what I am about to say real? Is it self-serving? If the answers are no and yes, most likely you're talking B.S.

To B.S. is basically to lie and embellish. Usually, people lie because it is convenient. They may want to look good, or they may have something to gain by B.S.ing. Don't go there, because this doesn't work in the long-term.

I have seen a lot of B.S. from consultants when they invent work to keep themselves busy. They make up problems that can be easily fixed, but they promote themselves by making those issues big and important, all out of proportion to reality.

If Individuals are asking you for specific proof of what you're talking about, take it as a warning sign. Somehow you lost people's trust in you, and they don't see you as someone with integrity.

## BE TRANSPARENT

Avoid behaving as if you have an ulterior motive or agenda or secret. Be open and transparent. Be accountable and upfront, especially with bad news. This not only includes when you give bad news, which is never pleasant, but also when you receive bad news. Otherwise, people will hide bad news from you. Run a transparent operation.

The most important issue about transparency is to communicate often. Communicate with colleagues, clients, and subordinates. The more you communicate, the less likely you are to encounter a rumor mill about you. Communication is the best preventer of unnecessary stress, gossip, and rumors.

Another issue with transparency is sharing information with others. Document your work and share it. You may be concerned about someone stealing your work and taking credit for it. A pointer for that: When you share your work, share with more than one person, especially if you're sharing with a colleague who may have ulterior motives.