

The Independent Perspective

Newsletter of the Consulting and Independent Contracting Professional Interest Committee

STC Society for technical communication

First C&IC Conference: Excellent Programming in a Perfect Setting!

A perfect Indian Summer day greeted the first C&IC Conference. Autumn colors were just beginning to appear in Oak Ridge, Tennessee. Tree-lined wetlands glimmered in the distance, beyond the windows of the Garden Plaza Hotel. The conference rooms were spacious and comfortable with art deco detailing skillfully blended into a modern decor. In short, the setting was perfect.

The full day of presentations and networking took place in an atmosphere of friendly banter and good will as "phone" friends from across the country finally met face to face. In a delightful, soft Bostonian accent, Fred O'Hara, Southeast Region Director-Sponsor, introduced the conference and set the tone with his wry sense of humor. Christopher Juillet, C&IC PIC Manager, thanked all the people who had made the conference possible and introduced the first speaker, Tallin Ensley.

Tallin looks like a pert twenty-year-old who couldn't possibly control a rowdy group of ICs, but she did. She made us work at 9 a.m. on a Saturday morning! Our first session was a test, the Keirsey Temperament Sorter. After answering 70 personal preference questions, we had to score our own test, and then the fun began. We talked about our scores, what they meant, and, most importantly, how we could use the information in dealing with our clients.

Our "homework" assignment for this session was a Scavenger Hunt. Throughout the day we were to listen carefully to our colleagues and learn as much as we could about them. It was a great ice-breaker. At the end of the day,

the person who learned the most about his or her colleagues would win a prize.

Our next speaker, Joyce Woods, used cartoons to expand on what we had learned from Tallin. We were asked to consider how people handle various situations and how this might be predicted by the test we had taken earlier.

Fred O'Hara came back "on stage" and launched into a discussion of the questions which people wanting to become ICs always ask, as opposed to the questions they should ask. Using the should-be-asked questions, he guided us through an analysis of the factors necessary to become independents.

The energy and enthusiasm running throughout these sessions can't be captured on paper. Chris Juillet, one of the driving forces behind that energy, showed us how to calculate a rational billing rate in his presentation, "The Meter is Running."

After lunch (a superb opportunity for Scavenger Hunting), Joyce Woods gave us a collection of forms which she has developed for use in her business. She explained how to use them, how they meshed with each other to form a paperwork system, and why it's important to keep complete and accurate records.

Chris Juillet's second presentation was "Fixed Quotes and Broken Promises: Crafting the Ties That Bind." The accompanying hand-out included guidelines for developing fixed quotes and sample agreements.

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STC Board Approves C&IC PIC Budget for 1990-91

At their September, 1990, meeting, the STC Board of Directors approved the C&IC PIC budget request for the 1990-91 program year. In so doing, the board has earmarked \$3,320 to support C&IC PIC activities for the coming year.

According to C&IC PIC manager Christopher Juillet, the budget allocations bode well for the committee and for STC. In a recent interview, Juillet said "It is a clear indication that STC and its leaders recognize its significant consulting and independent contracting membership."

"The number of private consultants continues to grow," he continued. "I read not long ago that independent consulting could well be the growth career of the 1990s. STC's significant and continuing investment in addressing the needs of their self-employed members speaks volumes as to their commitment to our profession's future. I know that investment will continue to pay handsome dividends."

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From Cold Call to Hot Prospect

by Lou Rubino

Once the hot and warm leads run out, the independent has to start making cold calls. The purpose of the cold call is to get an appointment. As experienced salespersons have learned, you can't sell expensive, complicated products or services over the phone. You need to meet your prospects face to face. The cold call can get that face to face meeting for you.

You can master the cold call by learning two rules. The first rule is: Never ask a question which can be answered by a simple "no." The second rule is: Always use a written script.

The importance of a written script cannot be over-emphasized. Use a written script! Hesitancy and mistakes on your part will make you sound like an amateur. You want to sound professional, confident, and capable. Using a script will also keep you from falling into the trap of trying to sell over the phone.

To develop a written script, use these six steps:

1. Get the listener's attention.
2. Identify yourself.
3. Identify your company by name or your service.
4. Identify why you are calling.
5. Use a key phrase to elicit a "yes" response.
6. Close the call by asking for an appointment.

The first line of the script (the call) should get the prospect's attention. "Hello, Mr. Woods" is sufficient. Always use the prospect's name. Be direct.

The second line identifies you and your company. "My name is John Jones, of Pen

for Hire." Keep it as simple as that. Don't ask how the prospect feels, whether he's having a good (or bad) day, whether he's got the time to talk to you.

Next, write out the benefits your company can bring to Mr. Woods' business. Why are you calling in the first place? Are you introducing a service, offering a product? Your third sentence should provide the answer. For example, "Mr. Woods, I'm calling today to introduce my technical writing service, which can improve your automated operations."

Next is the difficult part. You have to ask a question to which the prospect will answer "yes." Try something like: "Are you interested in improving your company's operations, Mr. Woods?" It's a pretty good bet he'll say "yes." If you were to ask: "Are you in the market for service manuals, Mr. Woods?" You'd probably get a "no."

You ask the "yes" question to get a controlling edge. Once you have gotten his attention and you have gotten a positive response, you don't have to sell, you don't have to overcome resistance.

If he says "No, I'm not interested in improving my company's operations." You say, "Thank you very much. Have a good day." Hang up and go to the next call. You won't accomplish anything with this person.

If he says that he is interested in improving his operations, say: "That's great, Mr. Woods; let's get together so we can discuss this in greater detail. How about Monday at ten?"

At this point your objective is to set the appointment and hang up. All you do now is confirm the address, the date and the time, and hang up. Don't prolong the call by asking more questions. You have the edge, keep it.

What do you do if Mr. Woods offers reasons for not making an appointment with you? If Mr. Woods says: "My programmers write our documentation," you can reply with something like: "Mr. Woods, other clients have told me exactly the same thing before I had a chance to show them the ways we could save time and money by increasing their productivity. Can we get together on Monday so I can do the same for you?"

The key is to turn the objection around, reassure the prospect and close. The technique is to repeat, reassure and resume.

You now have a simple, easy to remember script that says all you have to say to get an appointment. Does it sound too easy? Longer scripts allow too many opportunities to say the wrong thing, and they give poorer results.

You will want to track your results. Keep a chart of the calls dialed, calls completed, appointments scheduled, visits made, sales finalized. This chart allows you to monitor your efforts and evaluate your results. For example, if you've made twelve calls, gotten twelve rejections, and since statistically it normally takes twenty calls to get an appointment, you only have eight calls to go.

The cold call is an inevitable part of the repertoire of the independent writer. Since cold calling will probably take about 45 percent your time in a sale, the more you know about making successful cold calls, the better your chances of succeeding.

Lou Rubino has been a technical writer for twenty years and has been a member of STC since 1973. He became an independent in 1988.

Perspectives

by Christopher Juillet
C&IC PIC Manager

Autumn is come. To many, it is a welcome relief from the heat and hurry of summer, while to others but a brief reminder of the harsh cold of the winter that will soon be upon them.

To me, for now, it is a time to reflect on efforts passed. It has been a good year by most standards; good for business, good for STC, and good for C&IC PIC. While we've hit a few bumps and potholes, most of our projects are moving apace, thanks in no small part to the dedicated professionals who have taken responsibility for them. They are projects that you, as members of this group, have suggested and supported over the past 20 months. They are projects that have import in our world, that will provide valuable information to our numbers and perhaps to others not yet among the ranks of the independently employed.

Too, as the snow draws near and I begin look forward to evenings by the fire, a cat on my lap, autumn provides a time to map out the future, perhaps several alternate futures, from which I have at least some measure of choice. Part of those musings include the future of our now well-established professional interest committee.

Now is the time to begin considering what we, as STC members, really want to do with this new vehicle, this C&IC PIC; what we want it to accomplish over the long term; and how we want to benefit from its existence within STC, and how we want C&IC PIC to benefit STC.

I hope, as the days shorten and the evenings linger, that each of us will take a moment to consider how this group within a group can better serve the professional needs of our members and of the greater Society of which we are a part. And I hope some of you will take a moment to call me, or write to me, to let me know what new, innovative ideas and projects you have conjured up. After all,

that is the real value of a group such as this, that creative individuals can join together to help meet their needs and those of the whole.

Do you have a new address or telephone number? Let us know by sending it to:

C&IC PIC
Post Box 1725
Ann Arbor, MI 48106

AC Forum

C&IC PIC's Area Coordinators are scattered across the U.S. and Canada. The distances make the development of a cohesive group somewhat difficult, but not impossible. Sharing our experiences, discussing our goals, and generally doing what colleagues do when they get together to "talk shop" is what this column is all about. Join the group. Read what your colleagues are saying and then tell us what you think.

Ray Gendron, NH: I want to get the responses of non-members to the idea of a PIC. I'd like a "sounding board" forum at the local level, but I don't have time for another meeting. A BBS [computerized bulletin board] might be the answer because I think a national forum is a better solution. I have to ask myself, though, how much will local competition impede discussion?

John Minniti, MA: I am frustrated by the apparent lack of interest, especially when I think about the high rate of unemployment throughout New England. I have attributed the apathy to the fact that

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From the Editor

This month you'll find three new columns and they're all about you, your region and your concerns. With your help, I'd like to see these columns become regular features of *The Independent Perspective*. So, please keep those cards and letters (and disks and FAXes) coming in!

AC Forum. In addition to being the editor of the *IP*, I am also an Area Coordinator (AC). The job of editor is fairly well-defined. I am challenged by it, but I'm not at a loss for what to do or when. In my mind, the AC position, however, is still a nebulous possibility. It is, by no means, a clearly defined set of responsibilities and opportunities.

When I received my copy of the *C&IC PIC Leadership Directory*, I was amazed to see how many new colleagues I had. I wondered if they were sharing my sense of confusion about the job, or if they had a better sense of it than I did. The *IP* gave me an excuse to call these new friends and to ask what they thought about their new duties. What I discovered is that the

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Editor - Charley McWha
Consulting Editor -
Christopher Juillet

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Tallin Ensley's "Managing Yourself" reminded us to balance the needs we have in all of the arenas of our lives. As our own managers and like any good manager, we must not "burn-out" our "staff."

A Marketing Techniques brainstorming session was the last structured activity, after which Tallin announced the winner of the Scavenger Hunt: Julian Hacker of Conyers, Georgia. Julian received a copy of *Staying Employed: What You Must Do Today to Ensure You Have a Job Tomorrow*, a new book by C&IC PIC member Tom Daoust.

To close the conference, a Wine and Cheese Reception was held by the hotel's pool which is surrounded by tropical plants under a domed sky-light.



Project News

Anthology: This project is moving into the home stretch. The committee has been soliciting and receiving articles and conference papers on topics germane to technical communicators as practiced by ICs. As more STC members move from the traditional employment to careers as ICs, the need for more up-to-date information grows. This anthology will include information about getting started, marketing services, establishing rates, developing contracts and proposals, etc. (Anita Leininger, Coordinator; update by Tom Underwood.)

Resource Directory: The committee working on this project asks you to watch your mail as they will soon be sending out questionnaires, and they need your help to produce a comprehensive directory. (May Huddleston, Coordinator; update by Yeshoda Sing.)



SIG Focus: Interview with Joyce Woods

This is the first in a series focusing on Special Interest Groups (SIGs) for Independent Consultants (ICs). Joyce Woods has been with the Twin Cities SIG since it formed about three years ago. Known as the Communication Consultants Forum (CCF), this group is a vital part of its chapter and has been successful in its exploration of the rewards and pitfalls of ICs. CCF's experiences can help us develop local programs and SIGs

C&IC: How did you get CCF started?

WOODS: In February of 1988 I wrote an article for our chapter newsletter which asked: 1) What is a Consultant? 2) What is a Communication Consultant's Forum (CCF)? 3) Why should we form a CCF?

Al Poons collaborated with me to develop the answers. We defined a consultant as

someone who has their own company, is self-employed and/or does contracting for other companies. The definition was structured to cover the broadest range of independents. By adopting a general definition we hoped to be of service to the largest number possible.

The CCF defined as a special interest group within the chapter. This helps us focus on our role within the chapter and to not lose sight of our close connection to and our need for the chapter.

Determining why to form CCF led to much discussion as we revealed our own reasons for wanting such a group. The final result was a statement of purpose: 1) to address the many problems and rewards confronting consultants, 2) to be

see *SIG Focus*, page 5

Plans and Schemes

C&IC PIC enthusiasts are active everywhere! Here is just a sample of the kinds of things that are going on around the country for independent consultants.

ATLANTA, GA: STC Atlanta created the Freelancers Group to better serve its members working as independent technical writers. The main goal of the group is to provide educational and professional opportunities geared to their special needs. The group is off to a good start with the launching of its soon-to-be-released networking directory. The directory will contain profiles of independents describing their skills and experience and will be distributed to area businesses. Other projects (group insurance, certification and a resource library) are under development. For additional information on the Atlanta group, contact Tom Embry at 404-662-5618 (h) or 404-449-7570 (w).

Update by Steven Knapp

BOSTON, MA: Last January, the Boston Chapter hosted a meeting entitled "The Written Agreement: Protection for

Freelance Technical Writers." About 50 people attended the meeting at which two Boston attorneys discussed contracts between independent contractors and client corporations.

As a follow-up to that meeting, Boston Chapter member Rita Glover has been working with the attorneys to develop prototype contracts for technical communicators. Assuming all goes well, the templates will be offered to the C&IC PIC for dissemination among its members.

In December, the chapter will host a meeting entitled "How to Market Your Freelance Services", and the chapter's Workshop Committee is planning to offer a 1/2-day seminar on independent consulting in the spring.

Update by John Minitti

PITTSBURGH, PA: A planning meeting will be held on October 25th to discuss the level of interest there is for a local

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from SIG Focus, page 4

mutually supportive and useful to the group and to other STC members.

C&IC: How did you meet these goals?

WOODS: At our first meeting, we decided we needed volunteers to run one meeting or to give one presentation. Then, we had to have a meeting schedule. We decided to meet monthly throughout the year even though the chapter doesn't have regular summer meetings. Our ICs wanted the group support all year long.

C&IC: How do you arrange meetings?

WOODS: Basically, one person determines where we'll meet and then runs the newspaper announcements. Meeting structure went from sessions either preceding or following regular chapter meetings or on alternate evenings to its present form as a Saturday morning breakfast meeting. It was difficult to get people to come out on two nights in the same week. An added advantage of the Saturday morning meeting is that local restaurants are usually quieter, although you do have to plan carefully. Saturday mornings can be noisier than week nights, if parents are feeding their children before this fair or that game!

C&IC: Where do you get enough ideas for 12 meetings a year?

WOODS: That was never a problem. We had more ideas for topics than we could cover in ten years. The problem was picking the most needed topics and presenting those first. Some of the most successful topics have been: Marketing--How to Sell Yourself; Contracts--Developing and Writing; Professional Organizations Who Can Supply Services To ICs; and Networking.

C&IC: Do you have any programming other than straight presentations?

WOODS: Some of our most successful meetings are the networking sessions. We decided to have at least one meeting each year to share our resumes and to bring training materials and reference books we especially like. This gives us a

chance to see books that we have only heard about. If anyone has materials they no longer want, they'll label them so someone who does want them can take them home. We have informal networking at all our meetings and we try to keep each other informed on our equipment capabilities so we can support each other with or pass on jobs we can't handle alone.

C&IC: What are CCF's other services?

WOODS: We publish a directory for the SIG, which we distribute at no cost to area companies. If a member wants to be listed in the directory, we ask them to list their expertise, the services they offer, their equipment capabilities--both hardware and software. We publish at a break-even level. Currently, it costs \$25 for a listing in the directory. SIG members have been very pleased with the low-cost advertising the directory provides.

C&IC: How do you publicize the SIG itself?

WOODS: We get articles and announcements into the chapter newsletter as often as we can. We try to have an article in each issue either about meetings we've held or on a topic interesting to ICs. We also publish our schedule for future meetings and a questionnaire in the chapter newsletter so that any member who wants to join the SIG can do so easily.

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few people, whether they work as independents or directly for corporations, are willing to get involved. Maybe they fear that if they join the PIC they will be asked to become active members. At the risk of sounding pontifical, I have noticed during my 25 years in the profession that very few newcomers are willing to become active, participating members of the profession; instead, they look at technical communication as a job.

So be it! For the rest of us, it is important to band together, share our experiences and knowledge, and communicate with one another for the advancement of both our careers and the profession.

from Plans and Schemes, page 4

PIC. Basically, we want to see how many people would be interested in forming such a group, its purpose, topics for discussion, how often they would meet, etc. For further information, please call Evie True at 412-241-4886.

Update by John Clark

Editor's Note: If you would like to share the history of your SIG, call and let me know when we can schedule an interview. Your experiences can help other chapters with their efforts to meet your needs as an IC.

Editor's Note: If you enjoy *Plans and Schemes* and want to see it continue, please send: summaries of local events that are going to or will occur and evaluations of how well those events went and why they went

from From the Editor, page 3

ACs need a forum for sharing ideas about their jobs--what they are doing, what they want to do, what they think they should and should not do. I found that I am not alone in my confusion. So, the first new column is the AC Forum. Let's use it to develop some clearly defined direction. Get involved. This is your column. If you want to see it as a regular feature, send in your ideas, arguments, comments, whatever.

Plans and Schemes. While talking to Area Coordinators about their jobs, I've heard about many different activities for and about ICs. There are meetings, conferences, seminars and special interest groups devoted to ICs.

If we're going to see that our need for information is encouraged at the local level, we've got to have good ideas for successful programs. Sharing ideas with our peers can help us provide better

programming. This leads to the second new column, Plans and Schemes. For this column, I hope to see two types of submissions: 1) summaries of the events that have occurred or will occur in your area and 2) evaluations of how well those events went and why they went well, or why they didn't. This is your chance to brag about local successes and to help the rest of us avoid the pitfalls you've already encountered.

SIG Focus. Across the country, Special Interest Groups for ICs have developed in response to our needs. SIG Focus will give an in-depth look at a local SIG: how it got started, what the leaders did to encourage its growth, the problems it faced, and how it solved those problems.

Our first SIG Focus is all about the Twin Cities Chapter's Communication Consultants Forum. Joyce Woods graciously agreed to a lengthy phone interview after several rounds of telephone tag. Thank you Joyce.

Finally, I want to thank everyone who helped me with this issue. Many, but not all, of you will find your names scattered throughout this issue. Your response to my calls was overwhelming. In fact, I received far more ideas, comments and suggestions than I can print in this issue. So, if your submission didn't make this issue, look for them next issue. That, however, doesn't let the rest of you off the hook. I plan to continue my phone surveys, and I hope you'll all help me make these three new columns a big success.

Charley McWha
304-291-0878