

# The Perspective

Newsletter for the STC International Consulting & Independent Contracting Special Interest Group

## The Challenge of the 1997 Survey of Consultants & Independent Contractors

by Dr. Thomas Barker

The independent technical communicator isn't really independent. Abundant evidence in the 1997 Survey of Consultants & Independent Contractors ([english.ttu.edu/gscic/index.htm](http://english.ttu.edu/gscic/index.htm)) reveals that the independent is not alone. As White and Mackey point out, "Conservative estimates place the percentage of independent contractors and consultants in STC chapters anywhere from a quarter to a third of the members – a sizable proportion of the organization" (p. 1). While they work alone – and the survey reports right at 70% of independents working as sole proprietors – there is a growing awareness of an identity of independent writing as a field, and of independents seeing themselves as part of it.

Independents share concerns with other independents in a number of ways, many of which are suggested by the 1997 Survey. For example, the survey shows us the number of respondents to the survey (474 persons) who work in various industries: software, computer hardware, telecommunications, consulting, manufacturing, health care, "other," electronics, high tech, banking, and many more. This information helps us identify markets and can serve as a reality check that such markets exist. For those considering changing from one market to another, because of a need to change cities or in some other way respond to the demands that independents want to be able to respond to, knowing that these markets are there can reassure. The data indicate a very diverse field, suggesting that writing and communicating skills can take you down a number of paths.

But essentially, these pockets of practitioners out there reveal to us fragments of the larger economy grouped according to industrial similarities. Those who identify themselves as in the chemical industry, for instance, share some subject-matter knowledge with others in that industry, as do those in advertising. And those writers need, of course, to identify themselves as part of that industry. In doing so, they lose some of their independence because they must rely on other members of that industry to recognize conventions and respond to larger economic pressures in a unified way. Once you become a writer of medical office software, you know you'll be better off in a city like Minneapolis – where they have an inordinate number of hospitals and doctors, than in its counterpart in size, Salt Lake City.

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## New Year, New People, New Look

by Kelly Burch

**W**elcome to a new STC year! We're back this year with a new look and some new staff members joining the crew.

I'm taking over the reins as editor from Linda Bell. She is staying on to help acquire articles, news, and other content for the newsletter. I will handle final content, layout, and design. I have recruited Margaret Doss to help with copy editing and proofreading. Jo Byrd will continue to manage the printing and mailing. Together we hope to bring you a quality newsletter with content that interests, enlightens, and maybe even entertains you.

We have already set our schedule for the upcoming year. (See Tommy Barker's column on page 3 for the schedule.) We hope to follow it consistently so you'll know when to expect your copy of *The Independent Perspective* to arrive and when to expect the survey results, etc.

In this issue of *The Independent Perspective*, we have some new as well as returning columnists. Janice King brings us her "Marketing Mastery" with some tips on marketing and self-promotion. Tom Lenzo, in our "The Computing Consultant" column looks "at the future of the Internet." Ken Mauro shares his experience with "firing two clients" in his column, "On Being Independent." Please check out our other articles, book

review, and news.

We hope to round out the content even more with each issue by including news from local CICSIG groups — please send your news and pictures to me. I'm sure other groups would love to hear about your ideas and successes.

We also appreciate your feedback. I'd love to print at least one letter or message in every issue. Our goal is to bring you the information you need to carry out your business more successfully, but you can help us be more on target with your suggestions.

We hope you enjoy this inaugural issue. Until next time... ❖

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#### LETTERS TO THE EDITOR

We encourage you to send comments, suggestions, and opinions regarding *The Independent Perspective* or the CICSIG to the editor at the address below.

#### REPRINTS

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#### ADVERTISING

We welcome advertisers whose subject matter is relevant to technical communication, or of interest to SIG members. For rates, please contact the editor at 214/874-2695 or kburch@dallas.net.

#### SUBMISSION

Articles and news items should be submitted to the editor by the first of the month prior to the month of publication. Please submit files in either text or Word format to: Kelly Burch at kburch@dallas.net.

## 'Don't Agonize, Organize!' — A Saying for the 90's

by Dr. Thomas Barker

The 1997 year for the Consulting & Independent Contractors Special Interest Group reflected a number of accomplishments, including a well-attended progressive discussion, two informative sessions on education for independents (my personal obsession), an energetic business meeting, and stimulating networking luncheons. The year also brought its challenges, such as the need to respond to the expectations engendered in CICSIG members by new \$5 membership fee (an amount that, so far, hasn't shown up on the ICSIG budget.)

Faced with these accomplishments and challenges, the CICSIG management team members and I have tackled the 1997-98 year with a renewed faith in the triumph of organization over anxiety.

Sharing information on our new CICTEAM-L listserv, we have assembled a few deadlines for upcoming CICSIG information products. Kelly Burch, Jo Byrd and Linda Gallagher have organized four newsletter issues around the following and dates:

Issue 1—August 1 (Summer 98)

Issue 2—October 1 (Fall 98)

Issue 3—January 1 (Winter 99)

Issue 4—April 1 (Spring 99)

Kat Nagel, Karen Steele, and I worked out a schedule that will have a new brochure about the CICSIG by the end of the summer. Lori Corbett, Karen Steele and I have a workable schedule for the 1998 CICSIG Survey of Independent Contractors and Consultants. The 1998 survey is

included in this issue on page 9, and we'll publish the results in the April issue of *The Independent Perspective*.

In speaking of *The Independent Perspective*, I personally believe that the independent perspective is a larger perspective. It sees the writing profession, for example, from the perspective of an industry where vendors and clients work together in our new wired medium of business. This larger, more business-oriented, perspective underscores the need for education. Without education the stream of new practitioners into the industry will dry up and the reservoir of knowledge among seasoned practitioners will stagnate.

Here's what educational activities can do for both newcomers and old timers alike:

- encourage new independents
- allow sharing and testing of professional practices
- overcome professional isolation
- increase a marketing network.

For these reasons, and others, I see education as central to the work of independents. Workshops, such as Doug Florzak's "Successful Independent Consulting" ([members.aol.com/tdidoc/](http://members.aol.com/tdidoc/)) at the Anaheim conference of STC, do a good job of assembling information for those considering entering the field. Tom White ([tjwhite@teleport.com](mailto:tjwhite@teleport.com)) and Marreen Mackey have created a workshop called "Declaration of Independence: Strategies for successful self-employment in technical

communications," which, although currently offered only in the Seattle area, may be out in book form later this year. Efforts like these bring a degree of self reflection to the industry of independent work.

I'd like to offer you an opportunity to reflect on your industry sharing your experiences with other independents in the online book: *Getting Started in Consulting and Independent Contracting* ([english.ttu.edu/gscic/index.htm](http://english.ttu.edu/gscic/index.htm)).

Edited by Karen Steele and myself, this book offers a forum for you to post and maintain your own chapter. As you can see from the table of contents (see page 14), we lack authors for nine chapters. To express an interest in authoring a chapter, just send e-mail to me at [tbarker@ttu.edu](mailto:tbarker@ttu.edu). But first check out the table of contents and existing chapters to see where you'd like to contribute. As soon as I receive a chapter from you, I'll link it to the table of contents and send you your username and password for the server. It's easy then, using Netscape or an FTP client program, to upload changes to your chapter or expand on your ideas.

Looking ahead, I'd like to invite all members of the CICSIG to overcome their anxiety over their contribution to the SIG, and get organized by taking part in this online book, as well as the mentorship opportunities in such formats as our CICSIG-L listserv and *The Independent Perspective*. I'd also like to invite members to communicate with me about educational opportunities in their local chapters or on the Internet that I can pass along to the membership. ❖

## Make It So: Leadership Secrets From Star Trek: The Next Generation

by Judy Skinner

*Make It So: Leadership Secrets From Star Trek: The Next Generation*<sup>®</sup>

by Wess Roberts, Ph.D., and Bill Ross  
Published by Pocket Books  
Copyright 1995  
ISBN - 0-671-52097-0

**W**ess Roberts is no newcomer to the business book scene. His 1989 book, *The Leadership Secrets of Attila the Hun*, sold over one million copies. In my opinion, the new book, *Make It So: Leadership Secrets From Star Trek: The Next Generation*, has considerably more credibility than the first. Jean-Luc Picard is not only a better, more believable role model, but also it is less of a credulity strain to accept him as a teacher and mentor. I found it a stretch to picture Attila sharing his secrets with younger Huns who could later prove to offer a challenge to his authority.

The book is structured as a manuscript prepared by Captain Picard for Star Fleet cadets to serve as a resource on the various aspects of leadership. For a Trekkie, it's easy to picture the captain taking a few moments following a mission recording the events of the mission, successes and failures, and lessons learned. At some point in the seven-year mission, he gave some thought to training those who would follow him and added thoughts about the leadership qualities mission events evoked or illustrated.

Each chapter is devoted to one aspect of leadership illustrated by a particular mission of the Starship Enterprise. The captain provides a synopsis of the

mission, a list of the officers involved, and a set of lessons to be learned from the outcome. I must admit that die-hard Trekkie that I am, I became wearied of his saying "Make it so!" at the end of every chapter. It was, I suppose, inevitable.

I was especially taken with the chapter on communication. Of course every mission involved communication. The mission Captain Picard selected to illustrate his point involved the Children of Tama. Trekkies will recognize it when I say "Darmok and Jalad at Tanagra."

In the Children of Tama mission, the crew of the Enterprise encounters a people who present an unusual challenge to them. In spite of that technological marvel the universal translator, they cannot communicate! The technology translates the words, but their meaning is unintelligible. After much research, Data and Troi realize that the Tamarians communicate in metaphor. "It's how they communicate and it's how they think." Ryker asks if given an understanding of the way Tamarians think, "Shouldn't we be able to get something across with them?" Data says, "No, Sir. The situation is analogous to understanding the grammar of a language but none of the vocabulary." What a handicap!

The Captain tells cadets that as leaders they will normally interact with people whose words and expressions they will understand, but he emphasizes that unless they make a continuing effort to speak in terms others will understand

and listen as they speak, there can be no real understanding.

"...Effective communication," Picard says, "is the single most important element in resolving a crisis situation. Effective communication is also the single most important factor that can prevent a crisis situation." He goes on to list ten other lessons in effective communication, all of which are worth remembering and taking to heart. He concludes by saying, "Always bear in mind that no matter the means by which messages are given or received, your method of communicating must allow messages to be understood. Indeed, effective communication is the lubricant of effective leadership."

Other chapters include lessons on focus, urgency, initiative, competence, politics, intellectual honesty, interdependence, and resilience. All in all, *Make It So: Leadership Secrets From Star Trek: The Next Generation* provides a textbook of tools for aspiring managers who want to be leaders, in business or in Society activities. It's a book well worth your time, Trekkie or not.

*Judy Skinner is an Associate Fellow of the Society and long-time member of the Lone Star Chapter. She has worked for Candle Corporation, IBM, Texas Instruments, and Harris Corporation as Information Developer, team leader, and department manager. ♦*

## Beyond-the-Ordinary Approaches to Self-Promotion

by Janice King

**C**an a license-plate holder on a car be a self-promotion tool? It is for one independent communicator in my town; her license holder states “Technical Editor” at the top and her phone number on the bottom.

When you think beyond the typical brochure and portfolio, you can implement a wide variety of self-promotion techniques. While some may seem small, they can create a significant and lasting impression for your prospects and clients.

### Voice Mail Messages

Call your home or business phone number and check the outgoing message on your answering machine or voice mail system. Does it sound professional? Can you hear music, kids, your dog in the background? Is your voice audible and clear? Do you give the caller instructions on leaving a message if special keys are involved? You want to be sure that a prospect who calls won't be turned off by an answering machine message that sounds amateurish or like the family number, not a business line.

### Promotional Gadgets

T-shirts, coffee mugs, note pads, pens, paperweights — the variety of objects that can be imprinted with your name or logo is almost endless. You may want to use some of these objects for yourself, for trade show giveaways, or for client gifts. Several companies can show you a wide range of ideas (look in the Yellow Pages under “Advertising Specialties”).

### Thank-You Notes

Always send a thank-you note to a client upon completion of a project. Also send notes to the supporting cast in a client organization: those people who helped you with interviews, research, editing, or other resources. If you have ongoing work with a client, you may want to send thank-you notes more infrequently, but keep sending them! One way of saying thank you that has enduring value is to frame a completed project or an award it has received. Just think, your client is likely to hang the piece in

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the office, where it can be noticed by others — including colleagues or visitors who could be prospects for your services.

### Holiday Greetings

The holiday season is a good time to acknowledge current and former clients with a greeting or gift. You can also send greetings to colleagues, resource providers, and other “friends” of your business. While most greetings are sent around Christmas, you may want to send yours at Thanksgiving, New Year's, or on your business anniversary. Business gifts to clients can be an effective relationship builder, or a major error in judgment. You must be very careful about the type of gift you give, who receives it, and how you present it.

### Announcements

Anytime you have a major happening in your business, announce it to the world! Moving to a new office, adding new staff, equipment, or resources, or completing new projects are all topics for announcements. Be sure to describe the benefits to the client in your announcement. Otherwise, why should they care if you're excited about the latest whizzy software you've added to your system?

### Donating Your Services

You may be approached by a professional or community group about a donation for an auction, raffle, or other benefit activity. Consider donating a package of your services. This could be a certain number of consulting hours, a specific project task, a review of the successful bidder's publication, etc. Think of what you could do that would attract a new prospect for your services, that has a tangible benefit or value, but that won't create a burden for your time or efforts. Whenever you make a donation, be sure it is acknowledged in the program, display, or other material related to the event.

*Janice King is author of the new Web Marketing Cookbook and Writing High-Tech Copy That Sells (both John Wiley). She is an independent marketing writer who serves clients across North America through her company MarkeTech (Bellevue, WA). ❖*

## Looking at the Future of the Internet

by Tom Lenzo

Several months ago I attended a presentation by Jerry Yang, the co-founder of the Yahoo empire which includes the web site [www.yahoo.com](http://www.yahoo.com) and Yahoo - Internet Life magazine. He stated that at Yahoo they were the future of the Internet, and that future was approximately nine months ahead of the rest of the companies on, or involved with the Internet.

As a consultant, I'm always concerned with looking towards the future for my high-tech clients and for my skills. So what should I, and you, be doing regarding keeping up with the future of the Internet? To answer that question, I attended what was advertised as one of the largest conferences about the Internet.

"Internet World" is a series of 26 conferences around the world, with at least five in the United States and Canada. They are produced by Mecklermedia and have large exhibit halls as well as workshops and sessions. For information about the one nearest you visit [www.internet.com](http://www.internet.com). I attended "Spring Internet World" in Los Angeles. Here's some futures from the conference that you can use:

At the Digital Equipment Corporation exhibit I saw the latest copy of *The AltaVista Search Revolution* by Richard Seltzer, Osborne McGraw-Hill Books. This book explains how to effectively find anything on the 40% of the Internet that has been indexed by the AltaVista search engine. (For the rest of the Internet, *Search Engines and the World Wide Web* by Alfred and Emily

Glossbrenner, published by Peachpit Press, explains how to use AltaVista and many of the 145 other search engines.)

Need some photos to add impact to a document, but don't have what you need in your clipart collection? Go to [www.powerpics.com](http://www.powerpics.com), type in the key words that describe what you're looking for, download and pay only for the images you need.

While you're on the Internet, go to [www.techguide.com](http://www.techguide.com). They publish more than 65 free guides via their web site regarding document management,

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imaging, workflow, and other internet technology topics. They distributed paper versions of their documents at Internet World. You'll have to register on your first visit, but that enables them to notify you via e-mail when new, free techguides are published.

Are you developing software applications and need a spelling checker to check the application? Check out WordHound software from Associative Computing, Inc. at [www.mindmaker.com](http://www.mindmaker.com) (not to be confused with the game WordHound).

The TenFour Corporation, [www.tenfour.com](http://www.tenfour.com), had several e-mail related software programs. TFS Translation translates e-mail from English to several languages and vice versa, while TFS Encryption protects e-mail from unauthorized readers.

If you want to try voice actuated computing without the long training time some of the programs require, try Conversa Web. That software uses voice commands rather than your mouse to navigate web sites. It really impressed me because the vendor and I were using it in a noisy auditorium and the software did not require training to my voice. Their web site is [www.conversa.com](http://www.conversa.com).

If you're really into leading edge technology and want to use the Internet to make long distance phone calls, download free software from [www.net2phone.com](http://www.net2phone.com). The Net2Phone Company advertises that their program "can destroy every long-distance phone company in America."

If you're a webmaster, or want to be, go online and join the International Webmaster's Association at [www.iwanet.org](http://www.iwanet.org). There are several (at this writing) free membership categories, as well as local chapters. Another organization of this genre to check out is the Association of Internet Professionals at [www.association.org](http://www.association.org).

Additional professional information was provided by the many publications available at the conference. The most comprehensive web site for such information is from Ziff-Davis at [www.zd.net](http://www.zd.net).

There was a high-tech job fair at the conference with local and national firms participating. Employment web sites to visit include: [www.rhic.com](http://www.rhic.com) for Robert Half International's consulting division; [www.1800network.com](http://www.1800network.com) for computer network staffing jobs; and [www.careermag.com](http://www.careermag.com) serves candidates, employers, and recruiting agencies. The MonsterBoard, [www.monsterboard.com](http://www.monsterboard.com), presented workshops teaching employers how to use the Internet to find employees. Since the employers will be there, shouldn't you? Readers looking for a California-based job or career change should visit <http://jobsmart.org> sponsored by Los Angeles and San Francisco public libraries.

Finally, if you're wondering how to pay for college for your children, visit [www.collegenet.com](http://www.collegenet.com) for a very inexpensive method of applying for college.

As for the seminars, my favorite was The Business Site of Web Management by Jim Sterne. Visit his site at [www.targeting.com](http://www.targeting.com). So what is the future of the Internet? As one of the conference keynote speakers said, getting on the Internet is like getting on a moving train. My suggestions are go to the Internet World conference nearest you, and spend some time surfing the Internet, just to see what is out there. Bookmark those sites you think might be useful.

Or as one of my friends said, "Give a man a fish and you feed him for a day; teach him to use the Net and he won't bother you for weeks."

**Postscript:** several weeks after the conference, I learned that AIG - American International Companies, one of the largest insurance companies in the world, is now offering an Internet Professional Liability Policy. This product is for companies and individuals offering Internet-related services. It covers claims regarding copyright infringement, computer viruses, and other aspects of the web. Ask your insurance agent about this coverage.

*Tom Lenzo is a training and development consultant with more than 25 years experience in high technology environments. He is also the Employment Manager for the San Gabriel Valley STC Chapter. He can be reached at [tlenzo@worldnet.att.net](mailto:tlenzo@worldnet.att.net). ❖*

So “being a part of” can sometimes serve an independent well when it comes to identifying opportunities (in this case, in a marketing opportunities.) The 1997 survey, like its predecessors, gives us this kind of valuable snap shot of the industry, revealing both the independent-ness of the contractor, but also, curiously, the dependencies, on an industry, and on support organizations related to independent work. Let’s take the example a little farther, because if we looked at these figures over time, as in examining the last 5 years’ surveys we might see something even more valuable.

We all know that industries grow and wane because of global market characteristics. They used to say that Houston boomed when Detroit busted (for some reason, although you’d think they would both parallel one another.) Industries respond to one another, they also go and come. As White points out in this year’s survey “The kind of work listed least includes public relations, textbooks, business plans, and multimedia (p. 11).” Something tells me that multimedia isn’t going to stay at the bottom of the list for very long. Even without the luxury of seeing these data over time, I can imagine the growth that that form of communication and learning will undergo in the next three years, and how that change will impact the work of independent technical communicators.

This example of simple industry participation data, I think, could really prove to be a useful planning tool for both independents and those who hire independents. But we need to look at it over time in order to see how independents can not only respond strategically but contribute as members of a recognized field. I’ve given some

thought to what areas it would profit us to know more about. Consider this list:

- **Growth and diminution in various industries.** If we knew the patterns of growth and diminution of the industries independents serve we would have a window on what drives various markets for independent work. These factors could include financing trends, global politics, and rapid technological development.
- **Changes in the gender gap.** Patterns in hiring and compensation for women or men could reflect the social and business structures that independents carve out for themselves as a matter of course daily. These patterns might parallel patterns in larger social arenas like benefits planning or human resources.
- **Trends in years of experience.** Many independents like working as contractors, but many, as their careers mature, find themselves eyeing the billable hours of the consultant. But we don’t know at what time many contractors make the switch to consultant work or start sharing their collective wisdom with paying clients. On an even broader scale, the years of experience of these individuals reflects the collective value of the profession (as yet unmeasured and immeasurable by current methods). However, we all know the pressure to indicate our professional value these days.
- **Types of business structures.** Wherever you have necessity, as in the life and work of an independent, you have innovation in business structures. I never seem to talk to an independent who has exactly the same experience as another. Yet I do hear people asking about what kinds of professional roles all workers will play in the future. Peter Drucker calls them “knowledge workers.” Another writer invites us to get ready for the era of the multispecialist. I have news

for him: the multispecialist is here—the independent technical writer.

With just a little imagining I can see a number of ways in which the independent contractor is the harbinger of the future, both in the kinds of technical writing he or she does, and in the innovative business and professional situations with which independents cope daily. Because our survey is essentially a research effort, I begin to wonder if we couldn’t look to it to help address concerns of the technical communication community as a whole. In other words, if C&ICs really comprise almost one in every three technical writers, then surely they have a very clear and valuable contribution to make to issues of core competency, research agendas, strategic planning, and design that pre-occupy the larger field.

I propose an inquiry into the practices and principles of independent work that can easily start by minor modifications to our yearly survey. Ideas for modification are not new. White and Mackey, who compiled this year’s survey, mention the limits of the current survey. And at the annual STC conference, attendees get the chance to suggest areas for inquiry. I would like to offer, in conclusion, some areas where we might consider tweaking the questions so that they revealed both the behaviors of the independent contractor and also the over-riding issues facing the larger profession.

- **How do specializations change?** Many independent practitioners switch from one field to another, or make a career move into another industry. What prompts that, and what are the characteristics of skill sets that make one change more easy than another?

*Continued on page 14*

# Survey page 1

## Survey page 2

## Exploding Myths About Consulting

by William Oliver

I've heard lots of crazy things said about technical writing, consulting and contracting work over the years. Some of the more colorful descriptions include phrases like "combat pay, IRS back-audits, without a net, burned-out, cutthroat existence, hired guns, beached," and more. To some, I guess consulting work appears almost dangerous. For the well-prepared, it's not really that way. In my opinion, consulting work is the highest role to which a day-to-day working technical writer can aspire. Working as a consultant in our field for an extended period of time says that you are indeed a master of the trade. The best make it look deceptively easy. Let me separate some of the fiction from the facts about consulting work.

### Consultants make the big bucks...

Okay, a certain amount of that is true. But, wouldn't it be sad if the best and most experienced among us didn't do well financially? With equipment, marketing, legal, insurance, and other expenses, consultants don't make quite as much as you might think. Nobody I know who writes documentation every day is getting rich. Busy consultants just make bigger bucks than most; as well they should.

**Avoid short term contracts...** The truth is the shorter contracts are often more interesting and lucrative than the long ones. Managers of long-term projects know they can pay far less because of the perceived security in the "long-term." With a short-term deal, the negotiating tables are turned somewhat. By the way, most consulting contracts are extended at least once so the average short-term contract is longer now than it used to be (thanks, Yogi).

**Long term contracts are secure...** There's no such thing as a guaranteed contract in our business. Most agreements aren't much more than we-promise-to-pay-if-you-perform-deals with non-compete clauses. There are escape opportunities for everyone. No matter how long the contract, if something big breaks down (budget, technology, management, etc.), it's probably going to be "over early." On some projects, over early is a good thing. 1099 means IRS troubles... Not all contracts can or should provide you with "W-2 income." Type of work, length of project, location, tools, etc. all play a role in determining employee/contractor status. Recent reforms passed by Congress made it even easier to figure out where you stand. If approached properly, independent contractors invite no more scrutiny from the IRS than other small business people. Now, if you could only figure how to wiggle-in a deduction for that ski vacation?

### Contracting firms market individuals...

Rarely do contracting firms invest a lot of time in marketing a specific individual. The economics of the business dictate they market their own (and much broader services) first. Obviously, you can benefit a great deal if and when your capabilities match the needs of one of their clients. The best way to work with any recruiter or consulting firm is to cultivate a relationship over time and keep them up-to-date about your skills, interests and availability via a well-written resume. Whining and pleading followed by daily "reminder calls" won't help, I promise.

### Consulting is a cutthroat existence...

This one is way off the mark. While

contract technical communication is a business, there's very little backbiting or "trashing" of the competition. The reason? Corporate clients have very little patience for it. The general atmosphere in consulting is business-like, respectful and professional. And the relations between most working writers can only be described as supportive and collegial. There's a great deal of referring work to others, helping with technical problems, coaching, job-sharing, collaboration, etc. Does that sound cutthroat to you?

### Contracting firms are the enemy...

Occasionally, I talk with someone who believes contractors take advantage of writers. They see the contractor putting "a big markup" on their hourly rate. Unfortunately, their narrow perspective misleads them. The cost of capital, heavy up-front marketing expenses, a lengthy sales cycle, and lots of competitive pressures constantly gnaw away at contractor margins. Profits on individual contracts are actually quite small and it's very easy today to lose money on a contract. If contracting firms didn't provide valuable services to both companies and writers, they'd disappear. Sorry, your contractor is not your enemy; he's your partner. You'll spend a lot of time "on the beach"... This is a time-honored euphemism for looking full-time for that next contract. Your "beach time" really depends on your skills and marketing talent. If your portfolio is bursting with lots of first-rate work and your contact list is a "Who's Who" of the business, you'll probably never have time to get a great tan. On the other hand, if you're on the beach fresh off 20 years with nuclear missile docs, I'd buy a family-size bottle of sunscreen.

## Sometimes You Have to “Fire” a Client

by Ken Mauro

**M**any of the articles appearing in *The Independent Perspective* describe a path for success or a recipe for positive outcomes. This is not one of them. August of 1997 marked the end of my twelfth year in business. I generally feel successful, having made a nice living and supported my family, as well as accomplishing some goals on a personal level. 1997 also stands out for another reason; it was the year I got to fire two customers.

The first time it happened, I was writing a quarterly newsletter about the customer’s ISO 9000 program. Although I found the subject matter interesting and enjoyed the related learning process, I just reached a point where I had had enough. At first, I wrote the newsletter and printed two master pages for them to make copies. After the first issue, the QA Manager decided it would be nice to have it on canary paper, so could I deliver two reams when I delivered the copy? Sure — customer service, right? Then, it seemed a logical extension for them to ask me to get the thing done up at the local quick print. Right, no problem. I tacked on the printing costs and added my percentage. Of course, no one provides customer service without a payoff in mind. In my case, I was ready to bend over backwards to get a shot at some of the better paying work, writing technical stuff about their line of mechanical components. In the meantime, they continued to take their sweet time paying and managed to have a few of my invoices go astray. Finally, what was supposed to be a quarterly newsletter started to turn into something else, depending on the

schedule and availability of the QA Manager. Along the way, there were some smaller jobs I was asked to do, and I have never before or since had to haggle so much over price. So much for Fortune 100 corporations. Frankly, I got tired of the cheapskate approach and the irregular publishing schedule, and I just told the manager I wasn’t interested anymore. That may strike some of you as irrational or foolhardy, but I can honestly say I have never felt much

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regret over the decision. To me, the whole point is that when a writer is an independent, it’s great to be ... independent, just once in a while. I’m sure anyone who has labored in the corporate world and chafed under a dictatorial or incompetent manager can identify.

In the case of the second customer, I was putting together a reference manual for hardware that operates as a programmable logic controller and CNC for an engine block transfer line. The situation involved material for a training session just a weekend away, a strained relationship between writer (me) and the project engineer, and a dedicated but frustrated publications manager caught in the middle. A last ditch meeting degenerated into what seems, in retrospect, some comical

whining and finger-pointing by both sides. At the moment, things seemed deadlocked. I simply could not deliver what they wanted in the time remaining. Was it a question of my simply missing the deadline? No, mostly. I should be honest here and confess that the impasse had much less to do with content than with formatting. I freely admit that I have always hated Word, have never been proficient using it, and I avoid it like the plague. In most cases, and for 12 years, I have been able to sidestep Word because most of my jobs end up being done in final form using a page layout program and a subcontractor. In this case, however, my luck ran out. Thinking to avoid a disaster, I hired someone else to help me with the document, but even that wasn’t enough.

In the meeting, tempers eventually flared and I decided to leave. Well, it was more like a mutual decision. They showed me the door but I was already heading in that direction anyway. Yessir, I was doing it again; firing another customer. This was starting to worry me. During the long walk to the car, I thought about how this mess had developed, and considered turning back and trying to salvage the situation. Not so much for the dollars, since they had never been one of my prime customers. Certainly it was very important to try to resolve the situation in a professional manner, but most of all I hated to see a good personal relationship with the publications manager sacrificed in the heat of the moment.

At it turned out, I had to contact this fellow regarding payment. The conversation went well, and I sensed no resentment over what had occurred some weeks prior. Maybe we had both had time to mull over our part in what had happened. Then, some weeks later, I received a call from him about a project in another department. I was thrilled and relieved, and suggested we have lunch to discuss what all this meant.

I am now back with this same company, writing a technical sales guide for their manufacturer's reps. In familiar fashion, this project has moved forward in fits and starts, including the firing of the product manager. However, I am determined not to waste my second chance. I'm also pleased to note that with the exception of the project engineer (recently transferred to a "marketing" position), there seem to be no hard feelings from anyone over the events of last summer.

Life is interesting, and that goes double for the life of an independent. I am blessed with some very good customers who appreciate the skills and perspective I bring to projects. I have been fortunate to find a niche writing about machinery, industrial products and manufacturing, so that I don't have to compete with all of you lucky people writing about computers and software. However, the last 12 years have been a bit of a struggle in the absence of a mentor or an experienced boss. Being your own boss is great, until you look back and think about how "the boss" didn't always make the greatest decisions

or handle customer relations too adroitly. Still, I try not to be too hard on myself. Even though mistakes or missteps occur, belief in one's basic abilities and the value of the finished product serves as a reliable path to personal growth and monetary reward.

*Ken Mauro is an independent contractor in Chicago, specializing in manufacturing, machinery, and process. He loves the phrase "in terms of" and wishes more people would use it. ❖*

There's one final bit of fiction about being a consultant and that's anyone can be one. While most technical writers bump into a consulting opportunity now and then, not everyone is cut out for it. It takes talent, years of experience, confidence and a positive attitude to succeed. A fine portfolio and well-developed interpersonal skills are also big advantages. Finally, you have to really enjoy the work. If you come up short anywhere on that list, go slowly. However, if you've got all those things and long for independence, don't let any tired old myths get in your way!

*This article was originally published by Metro Voice, newsletter of the New York Metro Chapter. William Oliver is President of Techwrights, inc., a Randolph, NJ-based technical communication consulting firm. You can contact Bill with questions or comments at (800) 205-6842. ❖*

## Getting Started in Consulting and Independent Contracting

- **How do independents select equipment and technology?** Many researchers in human factors suggest strategic planning in selecting professional tools, yet many independents do it without the benefit of research heuristics. What are they learning that the rest of the profession could benefit from?
- **What processes do independents create and maintain for efficient off-site work?** As we all know, the ability of independent units both within and outside of corporations to negotiate and manage resources is a key to modern business practices. As experts in efficient off-site work what new techniques are independents developing that keep costs down and add to our store of knowledge about business?
- **How do C&ICs make the transition from contractor to consultant?** Many contractors would like to gain the academic credentials and experience to become consultants. How might a psychologist view this change, and what psychological changes go on in this transition?
- **How do C&ICs handle a blended family/business lifestyle?** The face of modern business is changing, including more home officing and family-friendly businesses. Independents know all about blending life and work, so you could say they're modeling the workforce of the future.

The 1997 Survey of Consultants & Independent Contractors reveals an active, diverse, and interesting group of technical writers. The group is growing, and its influence, if it were extended through these and other thoughtful changes to the survey, might grow even stronger. ❖

**Y**ou may already be aware of the online book created by members of the Consultants & Independent Contractors Special Interest Group of the Society for Technical Communication as a means of sharing information with persons considering careers as independent technical communicators. If you are not aware of it, or haven't visited it lately, please take a look at the web site where *Getting Started in Consulting and Independent Contracting* ([english.ttu.edu/gsic/index.htm](http://english.ttu.edu/gsic/index.htm)) resides. This very helpful guide is a collection of essays, compiled and edited by Thomas Barker and Karen Steele, that covers the business aspects of consulting and independent contracting in technical writing.

The table of contents is shown below. Some of the chapters still need an author, those that are available list the author in italics.

### Getting Ready

1. An Introduction to Consulting and Independent Contracting
2. Making the Choice, *Ryan Yuhas*
3. Picking the Right Employment, *Karen Steele, Steele/Case Communication*
4. Tapping into the Network, *Nancee Moster*

### Rounding up the Resources

6. Moving from Academia to Industry, *Thomas Barker, Texas Tech University*
7. Creating Your Consultant Image, *Joyce Woods, Cactus Software & Communications, Inc.*

### Working as an Independent

8. Managing Independent Work, *Suzanne Hosie, Write on the Edge, and Susan Witter, Puget Wordsmiths*

9. Working with Customers, *Betsy A. Frick*
10. Selling Your Business
11. How to Write Contracts
12. Basing Yourself Overseas, *Jerry Kurtz, Kurtz Communications*
13. Basing Yourself in the USA
14. Moving to a New Market

### Taking Care of Business

15. Getting Insurance
16. Estimating Documentation Projects, *Barbara Philbrick*
17. Managing Money and Finances
18. Setting Up Your Office
19. Growing Your Business, *Judy Glick-Smith, Integrated Documentation, Inc.*
20. Deciding Whether to Incorporate, *Alice Fugate, Fugate Publications*
21. Planning for Retirement, *John Brinegar*
22. Facing Ethical Issues, *Henry W. Meyerding*

If you are interested in writing or contributing to a chapter, please contact Tommy Barker at [tbarker@ttu.edu](mailto:tbarker@ttu.edu) to volunteer. He'll be thrilled to hear from you. ❖

15945 Curtis Avenue  
 Detroit, MI 48235  
 May 15, 1998

Linda (Bell),

I want to congratulate you and Tom White and Maureen Mackey and the committee that put together your Spring *Independent Perspective*. I don't usually get this exercised about a publication, but this one was great from beginning to end. I found Karen's article to be very valuable — good reminders of things we seem to forget to easily in our anxiety about how to market our services.

The survey was very valuable to me. Years ago, there was a consultant to consultants, as he styled himself, Howard Shenson, who did a lot of surveying of consultants and published the results in a newsletter to consultants. It was helpful in the same way your survey was — it gave averages of pay rates, determined how much time consultants spent each month on their various billable and non-billable tasks, etc. I think he either died or retired, and as far as I could tell, his firm didn't survive his leaving, so I haven't seen his publication in a long time. I had given up in despair of ever finding this kind of guiding material again and lo and behold, you did it!! I certainly hope you make this an annual event. For one thing, it will add considerable value to being a member of STC. I'm sure most consultants and contractors have these same concerns and it's too much work to do the surveys ourselves. Asking consultants you meet doesn't seem a wide enough sampling to make me feel

comfortable about the results of such a home-grown survey. But yours was very good and right on the mark.

I recommend the third paragraph on page 13 to your attention. I've done several surveys as part of the research done in my former job, and I know that every time one does a survey, he sees more than should be done next time. If it's possible, it would be interesting to get the answers to the questions listed in that paragraph. Two other things consultants and contractors might want to know, which I alluded to above, are:

**Question 1.** What percent of your costs are allocated to the following categories: (The percentages shown are from Shenson's old survey. I thought it might be interesting to you to compare them to what you find if you add these questions to your next survey.)

#### Costs

**Overhead rate — 98.8%**

Overhead Components	% of Total Costs
clerical support	11.6
office rent	4.3
telephone and postage	5.4
automotive	3.6
employment taxes	12.19
personnel benefits	10.8
insurance	0.1
licenses and taxes	0.2
professional development	4.3
dues and subscriptions	0.8
printing and copying	1.2

stationery/supplies	0.7
accounting and legal	1.4
practice management	10.0
marketing	30.5
other	2.2
<b>Total</b>	<b>100.0</b>

**Question 2.** How were the 3X days of [month] 199X used? [Just pick a month that is convenient or significant and ask how their time was broken down.]

Time spent on...	Days
client projects	13.1
marketing/selling	5.5
practice management	3.5
professional development	2.4
weekends/holidays/vacations	6.3
other	0.2
<b>Total</b>	<b>31.0</b>

You can, of course, add other money or time categories that are not mentioned here.

Thanks for listening, and thanks for this issue. It was more than I expected, so it made my day.

Sincerely,

Ernest D. Willoughby ❖

# Independent The Perspective

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Don't miss the  
1998 CICSIG Survey  
inside!!

Your feedback  
is very important —  
and appreciated.

## NEWS BRIEFS AND ANNOUNCEMENTS

### Authors and Columnists Needed

We need fresh authors and columnists to contribute to *The Independent Perspective*. Sadly, we are losing our "Marketing Master," Janice King, after the next issue. We will publish her final column in the Fall issue due out October 1. Please don't miss it. If you have marketing knowledge or experience you'd like to share, please contact us.

We also need articles on any subject related to Consulting and Contracting as well as reviews of books, software, and hardware.

If you have an idea for a new column, we'd love to hear about it. We'd love to add some humor to the newsletter, so if you have that comic flair, please consider writing a column for us. Contact Linda Bell at [editricks@aol.com](mailto:editricks@aol.com) or Kelly Burch at [kburch@dallas.net](mailto:kburch@dallas.net) with your ideas. ❖

### Send Us Your News!

In future issues, we would like to publish news from the local CICSIGs. We're interested in your activities, meeting reports, group successes, member highlights and achievements,

tips and techniques, etc. We want to make this a friendly forum for sharing our news and ideas. We also encourage you to include photographs.

Let us know what's happening in your neck of the STC woods! ❖