Collaborating with Colleagues

You need to recraft your practice – you are moving, you are bored or want to earn more money, you’d like your practice to better align with your values, you are transitioning to independent work, etc. How do you get advice and help around specific questions but also find ongoing support?

Build Your Network
- Meet other IMPs
- Network through professional associations
- Join AAM IMP

Ask For Help
- Ask for sample documents, e.g. contracts

Find New Markets
- Look for sister industries, e.g. healthcare, other nonprofits
- Stay on brand and with your core skill set

Get the Word Out
- Make a website
- Tell people what you’re doing now
- Be active on social media & in pro network groups

Find a mentor
- Network at professional conferences
- Informational interviews

Contact organizations to fill staffing gaps
- Look to other adjacent industries – education/schools/tech
- Meet others to subcontract or build a project team

Inform your committee networks of your new direction
- Join new associations (regional and/or profession based)
- Meet people at web programs, local organizations, roundtables

We know what we’re doing last asking peers questions about why and how
Collaborating with Teams

You’ve been part of consultant teams (good and bad) but never led one. Looking at an RFP you think, “I could try to do this alone, but it’s clear they have the budget to bring in specialists. And I’d be more competitive with a team.” As you think about being the lead for the first time, what are you asking yourself? Where do you turn for advice, not just for crafting the proposal and the team, but doing the work?

Picking the Team

- Select people you know and trust
- Make sure you check references if you’ve never worked with people before.
- Secure team and get letter of agreement with individuals before signing contract with client.
- Consider DEA! when selecting team members.
- Find people with different strengths/diffs than you.
- Build existing collabs with people who can bring you on to larger projects.
- Convey in a proposal how you might have worked together before as demonstrates that you can collaborate effectively.

Project Management

- Identify roles, responsibilities, and who is in charge.
- Agree on a method of communication.
- Designate a project manager.
- Identify clear roles.
- Delegate to freelancers?
- Think about separate contracts vs subcontracts within partnerships/teams?

Establish clear communication

- Clarity on all things. Don’t take anything for granted.
- Set clear schedules and deliverables.

Insurance/LLC

- Determine how the contract is structured (subs?)
- Articulate expectations and clarify.
- What about insurance? LLC vs. sole proprietors?
Collaborating with Clients

You’ve just been awarded a contract for a great project. You will be working with a newly-formed internal task force that hasn’t worked together before.

How do you establish a positive working relationship and facilitate effective communication? How do you and the client stay on the same page throughout the process so that you are successful?

**Emotional Intelligence**
- Figure out the existing power dynamics and try to use them. Or if they are dysfunctional, create strong alternatives.
- Manage expectations
- Build trust and foster positive relationships
- Consider the use of “I” or “we” when collaborating with clients depending on the purpose and who you are working on behalf of
- Respect their content and value their goals
- Determine level of hand-holding necessary

**Project Management**
- Use Teams, Project Management etc.
- Check-ins on where we’ve been, where we are, and where we’re going
- Be clear in communication, use email to have information to reference
- Beware deadlines even when the client delivers necessary information late
- Call, but follow-up with an email
- Schedule weekly or bi-weekly check-ins

**Contracts**
- Require on-site space if needed to improve collaboration
- Track your time—use a notebook, toggl.com, Harvest (which links to Quickbooks, etc.)
- Figure out the best method of communication (slack, email, google doc) and ensure regular and consistent communication.
- Define the process
- Beware of "scope creep"
- Scope of work is your friend.
- Consider whether it is project-based or better suited as part of a retainer
- Be clear about deliverables, feedback due dates, and scope of work (process for change orders).