# 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 Ask For Help Find New Markets Get the Word Out

Meet other IMPs

Network through professional associations Join AAM IMP Ask for sample documents, e.g. contracts

Look for sister industries, e.g. healthcare, other nonprofits

Stay on brand and with your core skill set

orand web

Make a What you're website Tell people what you're

be active on social media & in pro network groups

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 but asking peers questions about why and how

Meet others to subcontract or build a project team Look to other adjacent industries education/schools/tea chers for tools and ways to do things Use LinkedIn to be an independent professional with business name, etc. update linkedin to reflect the work you're doing!

Be active on social media

Network at professional conferences

Informational interviews

Find a mentor

Contact organizations to fill staffing gaps Stay connected with people through email newsletters.

cold reach outs on linkedin Facebook groups (usually for web projects)

Learn about recommended promotion tools

## 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

Secure team and

agreement with

individuals before

Consider DEAL

signing contract

get letter of

with client

when

selecting team

members

Select people you know and trust

Make sure you check references if you've never worked with people before.

Find people with different strengths/skills 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 so demonstrate that you can collaborate effectively Project Management

Identify roles, responsibilities, and who is in charge

Designate a project manager

Agree on a method of communication.

Identify clear roles

delegate to freelancers?

think about separate contracts vs subcontracts within partnerships / teams?

Set clear schedules and deliverables Establish clear communication

Clarity on all things. Don't take anything for granted.

Articulate expectations and clarify.

Insurance/LLC

Determine how the contract is structured (subs?)

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

Respect their content and value their goals

Consider the use of "I" or "we" when collaborating with clients depending on the purpose and who are you working on behalf

Determine level of hand-holding necessary

### **Project Management**

Use Teams, Project Management etc. Be clear in communication, use email to have information to reference Require on-site space if needed to improve collaboration

Check-ins on where we've been, where we are, and where we're going

Call, but

follow-up

with an

email

Beware deadlines even when the client delivers necessary information late

Figure of method

schedule weekly or bi-weekly check-ins Track your time--use a notebook, toggl.com, Harvest (which links to

Figure out the best method of communication (slack, email, google docs) and ensure regular and consistent communication.

Quickbooks, etc.)

#### Contracts

Define the process

Scope of work is your friend. Consider
whether it is
project-based
or better
suited as part
of a retainer

**Beware of** 

"scope

creep"

Be clear about deliverables, feedback due dates, and scope of work (process for change orders).