

Working Effectively as a Virtual Consultant

Insights from Clarity Consultants





Tips for Working Virtually

Have you ever considered accepting an assignment where you work virtually? You're not alone. It's estimated that 30 million people worked from home in 2016. Teleworking or working virtually is on the rise, and even the federal government encourages it as a way to reduce commuter traffic and carbon emissions across the country. To get you off on the right foot, here are some tips for making the transition to home-based work.

Assess Your Skills and Temperament

Melissa Chambers, eMedia consultant with Know Limits Media, suggests that teleworkers ask themselves the following questions before committing to a virtual work assignment:

- Am I self-motivated?
- Can I work autonomously?
- Do I have strong communication skills in a variety of mediums and modalities?
- Am I technologically savvy enough to be my own information technology (IT) support?

Working at home requires self-discipline and organization. Ideally, you should have an office or dedicated workspace within your home away from any distractions. People who have been teleworking for a long time recommend that you establish boundaries between your personal and business lives.

Are you skilled at communicating with others using email, instant messaging, and the telephone? And do you know which method to use when? Karen Sobel Lojeski, a professor in the Department of Technology and Society at Stony Brook University, the State University of New York, and author of *Uniting the Virtual Workforce: Transforming Leadership and Innovation in the Globally Integrated Enterprise*, cautions that techno-dexterity is a key skill for



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teleworking. Lojeski says that techno-dexterity refers to the ability to match the right technology to the right message so that it has the most impact.

Could you fix your personal computer (PC) or printer if it goes on the fritz? If any technical difficulties arise, you're going to have to troubleshoot the problem on your own instead of contacting the IT department or submitting a trouble ticket.

Set Expectations at the Outset

Establishing project parameters with the client up front is the key to a solid working relationship. Rick Vossman has worked for Clarity for ten years, serving such clients as Wachovia, PepsiCo, and Walmart. During his



initial interview with a hiring manager, Vossman asks three critical questions:

- How well defined is the desired deliverable?
- Do you know what you're looking for?
- What kind of analysis needs to be done?

"Clients should have a crystal-clear, well-defined deliverable in mind. If they don't, it can result in scope creep and missed expectations," Vossman says. Your role as a virtual consultant is to coax these expectations from the client if they're not stated up front.

Establish Lines of Communication

When you're not interacting face-to-face with your client, methods of communication become even more important. As you start your assignment, check in with your client and find out how he or she would prefer to stay updated. Should you hold weekly conference calls? Send daily written updates? Have a SharePoint folder or Dropbox account to share files? Setting these practices at the beginning will reduce your stress level.

MariAn Klein is a consultant with more than 20 years of experience. She has worked with Clarity for clients such as Deloitte and Symantec. She has also worked on the client side, as director of learning design and strategy at Wells Fargo. She emphasizes that the method is not as important as establishing expectations for communications up front with the client. Klein emails a bulleted list of her progress to clients each week, whereas Vossman prefers an Excel spreadsheet that serves as a tracking mechanism. "I just ask clients up front, what do you want from me in terms of communication?" he says.



Conclusions

Working virtually is quickly becoming a more accepted standard of working. After making some minor adjustments to their work styles, most virtual workers report greater productivity and job satisfaction. A 2015 study conducted by Stanford Economics Professor, Nicholas Bloom, showed a 13% increase in productivity and estimated savings of \$1,900 per employee. As companies embrace the positive findings, stigmas will be resolved and the number of remote opportunities will rise.

The key to working remotely is to establish working guidelines with the client at the beginning of the project and to stick to the agreed-upon conventions. Communication becomes even more essential in a virtual project, including knowing the client's preferred mode of communication and which mode to use for which purpose.

Follow these strategies and watch your productivity soar.