

The Business of *RGB CapacityWare*TM Engagements

A Primer for External Practitioners

I. Overview.

When Elizabeth and I started the "business," neither of us had the necessary prerequisite entrepreneurial experience needed. As a strong Blue I had ample vision but lacked the necessary Red to make a good go of it initially. Elizabeth joined the business when it became obvious her skills were desperately needed. If you don't have a good financial RED perspective, align with someone who does right from the start - they don't have to be Red to have the perspective needed, but it helps.

Whenever we've done an RGB Workshop we've been in a scouting mode right from the start. If there are people we think would do well "up front" with the RGB Technology we also ask ourselves, "Would they have what it takes to run the business of RGB?" The answer depends upon which avenue we would most likely support if they wanted to continue to a certification level. For example, would they most likely be using the material as an internal consultant, an internal program coordinator, or an external consultant needed to make a living at it. Getting to do the work as an internal is easier in many ways than having to survive as an external. The downside comes when the value of the internal work is not fully appreciated.

It has always been clear that when we certify anyone as an internal, the certification is "owned" by the individual not the employer. If that person decides to become an external, the certification stays with them, yet they may be ill equipped to withstand the rigors of entrepreneurship and may therefore need some assistance in making the transition. This guide may provide some assistance in that shift.

When we started the "business" we hoped a network of certified practitioners would form naturally. The network would foster support for each other in a variety of ways: improving the team capacity with talent and experience, and/or augmenting the quantity of practitioners that might be needed in a large-scale intervention. There is a benefit in network affiliations in the business of doing this work. If you are considering going it alone, be cautious.

We believe that the foundational two-hour RGB Workshop is the starting point in any engagement. The Progressive Design Matrix (Book 3, Tab 4) is a great illustration of our building block approach and ought to form the basis of any marketing initiative. Study it and the adjunct materials until you are completely at ease describing it to a potential client (even if that much complexity is not needed immediately). It has been a sad lesson, but once you provide a service to a client you have been branded by that service alone. Keep the Extended Progressive Designs alive and weave it into everything you do.

One difficult learning we've had is, "Clients want to be served by fully competent teams!" If you are trying to go it alone, stop. Think about the benefits of a team partnership even if it is a temporary. The diverse team of Elizabeth and Joe is a real bonus. Those who make a buying decision are normally at one end of the RGB spectrum or the other. Potential clients like to see

that spectrum covered by those that serve them even if they do not have the labels for it that we offer.

II. Your Situation.

The RGB FastTrack Certification process has a realistic questionnaire we ask potential external consulting candidates to think about and complete. This 10-item survey identifies several important considerations to be discussed before continuing down a path filled with confusing possibilities. There are numerous potential situations that a candidate may fit, so we'll describe the two outer limits knowing that your situation is likely between them.

- A. Part-time, Intermittent with Low Investment.
- B. Full-time, Regular Office Hours with High Investment.

III. Progressively Complex Intervention Designs.

If you've never been an independent external consultant and have little or no experience in complex interventions, you'll need to partner with someone who has those qualifications before you take on something that you are not able to handle. Even those who have completed the five-day certification courses (total of 10 days) for both facilitation and RGB often find themselves uncomfortable with long-term complex interventions. The network may include several sources depending upon the type of expertise needed. In any case you can always depend upon Elizabeth and I to assist when needed.

The level of complexity may be illustrated in the following progression descriptions:

- A. A Stand-alone Event Design.
- B. A Short Series of Linked Events.
- C. A Combination of Preparatory Events Followed by Continuous Integrated Activities.
- D. A Series of Progressive Cyclical Interventions.

Our network encourages every member to have and maintain a relationship with one or more mentors that can assist with any transition of complexity. As experience is gained, the relationship with the mentor(s) is likely to change and, in time, will likely evolve to a point where the mentee becomes a mentor to a new crop of aspiring practitioners.

IV. Your Business Plan.

The Realignment Model (Book 4, Tab 2) provides the ideal launch pad for a business plan. As an illustration, see our Blog at <http://rgbprozone.blogspot.com> - go to September 2010, to help create your own simple business plan based on the elements of the Model. Remember that Missions attract revenue, while Programs deplete it. Know what you want or need to attract and know what you'll spend in to categories: maintenance and deliberate expansion. Create a monthly budget. Have a set amount that will trigger decisions to keep you afloat and/or permit growth successfully. Know what you'll do if growth decisions have to be reversed.

Here are a few strategies we'd recommend:

- A. Maintain a home office whenever possible.

- B. Set aside money to pay taxes and provide a buffer - a six month float is desirable.
- C. Keep costs low until revenue streams stabilize.
- D. Avoid hiring employees - use the 1099 options - remember the network.
- E. Pass costs along to clients whenever possible - RGB counters are like a doctor's x-ray.
- F. Acquire retainer clients whenever possible.
- G. Avoid having a few large clients at the expense of more small clients.
- H. Cultivate a niche and stick with it - client prefer a specialist and will pay for it.
- I. Team with others to cultivate creative tension.
- J. Create and maintain records that inform decisions - clinic everything.
- K. Depend on **ProZones** to get you where you want to be.
- L. Read the most popular books so that you can connect what you do to those works.
- M. Participate in network activities - clients like to be served by those in associations.
- N. Place a priority on cyclical data collection and reporting as a baseline revenue service.
- O. Aspire to network leadership.

V. Marketing Strategy.

When you do the Business Plan, pay special attention to the Strategy Bridge. Identify events and/or conditions that will trigger a shift to any strategy that will provide you with an advantage in the niche you intend to pursue. Know your niche as an acknowledged expert.

- A. **Advantages** - think about your niche and their needs you can best satisfy.
- B. **Scenario(s)** - construct three: probable, better, worse - track indicators.
- C. **Initiatives** - look for new and innovative offerings that create a unique category.
- D. **Standards** - never, never, never sacrifice quality - always stick by your values.
- E. **Products and Services** - avoid under-pricing unless there's a bundle.

Summary

Write it down and refer to what you've written often. If something isn't working abandon it after a fair trial. Partner with the void you need filled. Call on the network for help. Use the RGB Technology on yourself BEFORE you use it on others. Once you have created the image you want, protect it. Be unique in your approach to solving clients' problems. Be visible on the web - make it easy for potential clients to find you there - but never avoid the **ProZone** to attract and keep clients. Be what you are, not what you think your client wants you to be. Expect there to be failures and learn from every one of them. Elizabeth and I are a valuable resource for anyone in the network - use us, but cultivate new resources within the network and within the consulting business. Read practical publications. Education and other credentials will open doors with some potential clients, but your delivery on promises will cement the relationship. Always develop a support system inside the client organization for both you and the benefit of the client. Use a showcase environment to create a credible **ProZone**. Ask for referrals only when the client is solidified. Know the client service LEAD roles: client LEAD, technology LEAD, event LEAD and don't try to fill them all with one person. Huddle with the Client Service Team often and know that this team is the most important capacity development effort the client organization will ever encounter - you must model what you what them to covet.