Q For nine years, I have run a consulting business as a sole proprietorship. My biggest challenge is how to manage a completely unpredictable workload. Clients often shift their schedules dramatically, leaving me with too much work at one time—or no work. I have survived by means of a constant juggling act, suffering through some idle times and, more typically, overwhelmed times. How can I get better control over my work flow?

A I think the situation you describe has hit all of us at one time or another. This is one of the aspects of the profession that make it both a dream job (you get to work on what you like, with whom you would like, and so on) and a nightmare (you have to constantly work at attracting and maintaining clients and balancing the workload and the shifts in clients' expectations).

Getting overwhelmed by client demands while trying to balance the everyday needs of our lives and work happens to every one of us. This is as true for clients as for you, which is why you are confronting this difficulty. Face it: many clients live in their own world where their own concerns (especially crises—real or imagined) come first, and commitments—while important—take second place to the current "emergency."

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Accountants and lawyers have this problem in dealing with their clients, just as consultants do. However, because of the constant demand for their work, many of them have learned to deal with the problem much better than some consultants ever do. They detach themselves from the emotional need to please every client, while remembering that it is their responsibility to provide good service to the client.

The solution to the dilemma lies in an oft-overlooked place—within you! A good approach to this problem is to take two steps:

Step 1. Shift Your Mind-set

You must first recognize that your clients' problems or crisis properly rests with them, not with you. You are a consultant, not the cavalry coming to their rescue. You are also a businessperson. This means that you have as much responsibility (or more) to manage the concerns of your own business as you do to manage client work. Once you stop ranking your concerns secondary to client needs and demands, you will be in a better position to set up a relationship with your clients that will support them in getting the results they want while you work it into your legitimate schedule. (Remember that one of the biggest investments you can make in your own business is to plan plenty of time for marketing and sales activities. The failure to do this is the biggest cause of the roller-coaster effect for consultant revenues.)

Step 2. Alter Your Conversations

Conversations exist on several levels:

1. The conversation that you have in your head about your clients, their needs, your circumstances, your value, your fears, and the like.
2. The verbal exchanges that you engage in with a client and the unspoken, silent understandings that take place in normal human communication. These occur in phone calls, sales meetings, and in passing while you are working on their projects

3. The documents that are prepared (agreements, contracts, letters of understanding, and addendums) to memorialize what is expected.

You must alter and manage each level of conversation you are having. Begin with the one in your head, your mental dialogue. This conversation with yourself is guided by a system of beliefs about yourself, your client, the problems that each of you is facing, and your estimation about your own value. To the extent that any of this "head talk" is based in fear (not performing well, loss of the client, self-doubt), you are bound to be less than effective. You must shift this conversation to one that acknowledges and affirms the value of your work to the client; one that affirms the validity of your investment of time in your own practice development and in serving other client and personal needs as well. All things that are important to you must be given equal validity in your mental dialogue . . . and in your planning and actions.

You are a consultant, not the calvary coming to their rescue.

Your communications with clients must treat their concerns appropriately, but they must also outline clearly and specifically what you need in order to succeed. Both their concerns and yours must be taken into account in order to deliver the desired, mutually rewarding result.

Accountants do this by letting their clients know that they must provide good bookkeeping records and that they must provide a knowledgeable person within the firm who can work with the CPA on getting the intended result the firm needs. Lawyers do this by requesting the cooperation of their clients throughout their work together and requiring clients to disclose all knowledge of the situation at their disposal.

Similarly, in your setup with your clients, you must let them know what you expect of them and what they can count on. Do this in a face-to-face conversation with the client so that each of you has a clear mental picture of what expectations and actions are to characterize the relationship. Ideally, this is done prior to contracting with the client. When the client is not willing to set up a mutually agreeable set of guidelines that work for both of you, you are in a prime position to walk away from the project before accepting any work, fees, or responsibility.

Document your expectations of one another, the agreements, and the plan of action—along with the responsibilities of each party. Once agreed upon, you must be the traffic cop who monitors performance and keeps everyone on track for getting the job done on time and on budget. Only when documented in writing will you be able to reference the agreements that you both have made.

Your role is to be your clients' partner, not their servant or knight in shining armor. However, it does require that you be the lead partner, rather than assuming that clients are aware of what they want and when they need it.

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