

PART V

How the Keys Work for Those Who Do Not Work in an Organization

Increasing numbers of people no longer work in an organization; they are what I call “solo operators.” Anyone who works alone (without being employed by an organization and who is not an employer of others either) is a “solo operator” per this definition. Classic types of solo operators are independent entrepreneurs, consultants, and others who are neither employees nor employers. What if you are one of these solo operators? Can the 10 keys of this book be of any help to you?

As indicated in the opening passages of the introduction to this book, even if you are a solo operator, you probably deal with people who *do* work in organizations—they could be your customers, suppliers, or partners. You can better understand the challenges these people face in their jobs by viewing their situation through the lens of the 10 keys, and this will help you to deal with them more effectively.

You can also analyze your own situation by using these 10 keys—suitably modified to account for the fact that you are not formally employed by an organization—to improve your job performance, job satisfaction, happiness at work, and personal and professional growth. How such analysis can be conducted is illustrated next by Donna Finley, a solo operator *par excellence*.

Reflections of a Solo Operator

by

Donna Finley

The solo operator is a challenging and rewarding way to channel a set of unique skills and appetite for change. As professionals mature through their career cycle, the opportunity to become a solo operator increases. However, experience is not the central component of this role, rather, internal drive, leadership acumen, and ability to adapt quickly and frequently are essential qualities for this career to succeed.

As there are many types of solo operators, I want to begin by describing the type of solo operator that I have been for the last 28 years. My background in brief is in the Appendix at the end of this chapter.

I have worked as a solo operator with organizations through a variety of different contractual arrangements. I have been brought in to help solve problems, and to navigate challenges and opportunities to take organizations to the next level of success. Typically, I lead a specific project, or a series of ongoing projects, while working closely with senior leadership, managers, and employees of the organization to develop strategy, plan, and assist through the implementation effort. Rather than prescribing “solutions,” I guide the organization through rigorous internal and external analysis to arrive at mutually agreed-upon strategic options to pursue. Following this work, I may or may not continue working with the organization—whether on the current project or on an ongoing basis on future projects. I am expected to provide expertise, leadership, and objectivity, while assisting with the work. This is at the heart of what I do as a solo operator.

Comparison to Entrepreneurs

The main difference between my work as a solo operator and that of the classic entrepreneur is in the purpose behind the work. Entrepreneurs work on their own endeavors; I adopt and work on projects within organizations owned by others. However, like the classic solo entrepreneur, I also feel personally invested in the success of the venture, capped only by the duration of the relationship.

My type of solo operator and the classic entrepreneur share some characteristics. We are tenacious individuals who see each step along the way as an opportunity to hone abilities based on our previous experience. We are risk takers who are motivated by challenges. We are creative thinkers, who build forward on previous solutions. We are personally invested in the success of our clients, yet we are professionals who use the freedom and flexibility to shape our work and schedules each day. We pursue work that aligns with our evolving interests, skills, values, and passions.

However, some characteristics distinguish my type of solo operator from the classic entrepreneur. While an entrepreneur builds an organization around his or her dream, product, or service, a solo operator builds a community. An entrepreneur’s energy is inward, directed to building an organization: hiring people and directing all aspects of the business (marketing, human resources, project management, design). They are exclusively dedicated to the organization they create and reap all of the residual rewards of the business effort.

In contrast, my type of solo operator accumulates knowledge without traditional asset creation. My energy is spread outwards, generating income by contracting myself out over and over, creating value where none had previously existed. Through this process, I develop a particular set of skills and resources, and generate revenue by expanding my business network over time.

Comparison to Consultants

While my type of solo operator shares many common characteristics with traditional consultants,¹ the primary difference is the type of engagement. The collaboration I require for my approach is at the upper end of the scale of involvement with employees of the host organization. Continued involvement with an organization could include periodic engagements, as required, resembling short-term employment. This depends on the needs of the organization, the scope of responsibility, and the duration of the project. Although one may have significant expertise in a wide array of business or technical fields, my type of solo operator does not necessarily embark on projects to impart their

¹ Consultant: a person who gives professional advice or services to companies for a fee (www.merriam-webster.com).

wisdom onto the organization; but rather to guide the organization through the work, driving the process, building knowledge capacity in teams, and mentoring senior leaders. Moreover, my work focuses on discovering root causes of barriers and resolving unforeseen issues along the way. In this way, my type of solo operator looks and acts much more like an employee or senior manager than an external consultant. Very simply put, a solo operator “lends a hand” albeit a very experienced hand versus bringing in a particular solution.

What Has Worked for Me as a Solo Operator

I am typically hired into organizations that have problems to solve, requiring strengths unavailable in-house, in conjunction with objectivity and a fresh perspective. I have no vested interest in any particular answer because I am an outsider who is independent of the internal politics, systems, and processes that have been built by others. I have also served in the capacity of an “in and out” leader, periodically providing mentorship, advice, and “course adjustments” over several years. To be effective, I have found a number of conditions to be critical.

Lead From Behind

It is important for me to “lead from behind” by seeking out senior managers and employees who are knowledgeable, thoughtful, well intentioned, and influential. Through a careful vetting process and various conversations supported by these leaders, it is possible to surface facts and internal perspectives that allow the organization to learn, and derive new insights and conclusions. My type of solo operator can provide organizations a great service by giving a voice to those who think they don’t have a say or are not usually heard. This may sound rudimentary; however, this work is never easy. It is a calling for which I have endured many sleepless nights, as this voice is often not welcomed by entrenched management teams yet is an important part of the solution and needs to be considered. By the time I arrive, the situation has often deteriorated so much that people are refusing to talk to one another and the deadlock is well entrenched.

Challenge Traditional Assumptions

Deadlock can be accompanied by disagreements and strategic paralysis. In such an environment, people need to feel safe to speak and to know all perspectives are relevant and valuable. The immediate goal is to ensure that important decisions are made to guide continued healthy business operations and customer service. To move forward from such a point, the process can be arduous, yet very rewarding. By listening generously to the content as well as by feeling the emotion behind the words, I take copious notes, often writing down the exact words used in the discussion. I reflect upon what I have seen within the organization as well as outside the organization, in its context. I subsequently synthesize what I have heard, seen, and felt into images, ensuring objectivity. Unfortunately, this candid perspective is not always welcomed, making it not uncommon for managers to perceive me as directive. In reality, I am suggesting alternate courses of action they had not considered and am waiting for them to take a clear stance one way or another.

Leverage Experience Into New Contexts

On a personal level, the work of my type of sole operator is infinitely rewarding, stimulating creativity and interest in the work. I leverage a wealth of experience from multiple sectors and types of organizations and multiply its effects. This enables the host organization to benefit from an injection of innovative thinking that has proven successful elsewhere. Without the shackles of day-to-day busy work, my type of sole operator can focus their energies more directly, and aid organizations in new ways of thinking without increasing the head count. In turn, the host organization increases its functionality and professionalism, as it benefits from a new, committed, expert-employee who brings in new processes and constructs to quickly elevate the abilities and performance of employees.

When these observations and processes are embraced by management, the results and impact on business and employees can be profound.

Characteristics of an Ideal Host Organization

Inviting in a temporary senior expert-employee requires a host organization that has an appetite for change and a willingness to employ new ways of working. To most efficiently benefit from our partnership, the organization should possess advanced skills in leadership (of which there can be many styles) and the desire to lead, while at the same time maintain a mentality/predisposition to

serve, guide, educate, and in some cases, nurture. Ultimately, however, success is measured through the relationship, especially the level of respect and trust attained. The evidence of a successful, strong relationship can be an invitation to work with the organization again. In fact, a good portion of my work is by word-of-mouth referrals.

What Does Not Work

A lack of support from the host organization in terms of leader involvement/commitment can be destructive to my work. A lukewarm senior leadership team and/or Board or a heavy-handed “my way or the highway” attitude will not positively affect the organization, rendering the candid perspective of the solo operator inconsequential. A recent project with a provincial human services agency supporting youth illustrates the effects of a lukewarm commitment. The original proposal called for a task team of three senior leaders to work collaboratively with my team. After just two months, only one director remained involved, who then was unable to effectively communicate key changes required within the organization to her peers. This resulted in more gridlock, misunderstandings, and lack of leadership, with several recommendations being discounted as simply “not relevant.”

Similarly, a lack of commitment for the project or thoroughness by the sole operator will yield comparable results.

Although the sole operator may have the best of intentions for moving an organization toward success, the credibility of the solo operator and buy-in by the host organization must be established and maintained. Once a project is secured, a steep learning curve exists for the solo operator, for each and every project. This learning curve is frequently aggravated by timelines, purposely made short if financial, Board, or external pressures are extremely pressing. As one successful example, I was invited to facilitate a process to increase Jewish student enrolment in local Jewish day schools despite being outside that faith and culture.

Keys to Success

When I enter a situation, I have been hired to create a new way. I’m an outsider. I rock the boat because I challenge traditional assumptions, established rules and paradigms, which often disturb the status quo as well as the leaders who are working to maintain that status quo. Consequently, I need to have great faith in myself and quickly build trust in others. At times I have heard things like, “Your style is aggressive”; or “You drive too hard.” However, on the other side I hear: “How did you see that so clearly?” and “How did you put that together?” To be my type of solo operator, you need to have desire to serve, self-confidence, belief in your methods, and the ability to, “Keep your head when all about you are losing theirs,” as Rudyard Kipling said.

One particular case stands out in my career. In my final presentation to a consortium of three provincial government departments, I was questioned and accused by the Chair of not understanding or being aware of the organization’s mission and objectives in front of 25 people. Taking a deep breath, I confidently gave a clear and concise summary of their mission and how my recommendations aligned to advance their purpose. Following the storm, three independent community members approached me to quietly confirm their support of my stance.

Upon reflection, there are several ingredients to success for my type of sole operator. These characteristics include the ability to learn and adapt quickly, drawing upon past experience and reservoir of knowledge and applying it creatively. Teamwork and an aptitude to “work and play well with others” are also necessary for my type of solo operator, as we constantly seek to support and foster leadership in others. Accompanied with trust, these traits build capacity in the host organization leading to a higher level of performance.

I said earlier that “success is measured by relationships” in regard to organizations. This same rule applies to my type of sole operator. Bonding with key leadership and employees is critical.

I always identify and nurture “anchors” (i.e., influential leaders) within an organization who give me the credibility I need to build trust with others. For example, my key anchor in a major transformation at the University of Calgary was a renowned traditional scientist and vice president of the university’s administration. This highly regarded and credible academic helped to translate and transfer knowledge, and pave the way for acceptance of major changes proposed by an outsider (me and my team).

Externally, I rely on key mentors to help me maintain confidence in my leadership style and to remind me of my strengths. These people are essential supports that encourage me, challenge me, and offer me ideas and strategies.

The Theory of Success for a Solo Operator

Shifting our focus back to the 10 keys outlined in this book, all are important to my type of solo operator but how they are used will vary from one solo operator to another. How each key generally works for me is described in **Figure 13**.

Figure 13

The theory of success: How each key generally works for me

Key	How each key generally works for me
<p>Key #4: Your credibility</p> <p>The higher your incoming credibility in the organization when accepting a new project, and ...</p>	<ul style="list-style-type: none"> • Credibility is what distinguishes me from other competitive alternatives being considered by the hiring team. • It directly affects my ability to lead and quickly engage participants.
<p>Keys #5 and #6: Determine your gaps prior to accepting a new project</p> <p>The better the diagnosis that you have conducted prior to accepting a new project, and ...</p>	<ul style="list-style-type: none"> • “Fit” is critical to developing trust with the organization, understanding organizational values and project requirements, and assessing the skills and capabilities of assigned team members. • I try to get the following questions answered before accepting a new project: Do I need to augment my own team with additional subject matter experts (SMEs)? Do I need to incorporate additional market research? Is a critical date driving the project timeline? Is this a collaborative organization? • I assess organizational commitment to making hard decisions and the sophistication of their planning processes and experiences. • I look for their willingness to learn and change what they do and how they do it including organizations outside your sector. • I want to understand their budget expectations and restrictions because this indicates the scope of the project and resources the organization is willing to commit to for this work. I will adjust my scope and resources accordingly. • I try to identify a clear, influential leader supporting the endeavor and to ascertain the degree of his or her credibility within the organization. This person will act as a key translator between the organization and me, as needed changes are identified, and help to provide resources as well as remove barriers. This person will remain in the organization influencing implementation long after I leave. • I research who the organization has used before for planning support and the reasons why or why not that effort was successful. I ask, why aren’t they using that consultant for this effort? • I determine who the decision-makers are for the work: Who has the “final” say? Who would I be reporting to?

Key	How each key generally works for me
	<p>Who are the key individuals and groups I will have to persuade? How does one go about selling a new idea in this organization?</p> <ul style="list-style-type: none"> • I determine if the project lead has a previous connection with a leader I have worked with (word of mouth). • I determine if I am the best fit for the work or if one of my business partners is a better fit for the engagement.
<p>The more you have avoided the traps that derail the recruiting process, and ...</p>	<p>How I deal with traps under the organization's control:</p> <ul style="list-style-type: none"> • Language code: I use words carefully to describe my intentions. • Organizational oversell: Typically, the organization has less information about markets and about customers than is required, and what they do have is not always helpful. • Organizational seduction: They often tell me: "You are a recognized SME!" But then they ignore my advice when the going gets tough or the change I am recommending is too great for them! • Homosocial reproduction: I do not fit well in "macho" companies. Since I am a female, I am perceived to be collaborative, which I am, but I am also confident, analytical, and candid, and the organization often finds it difficult to deal with this. • Interviewer's agenda: Sometimes it is difficult to determine if the organization is looking for me to justify the position they have already taken or if they are open to new thinking. <p>How I deal with traps under my control:</p> <ul style="list-style-type: none"> • I try to avoid self-seduction by inquiring about the potential organization through my peer network: What are they like to work with? How committed to change are they? How is decision-making conducted within the organization? Who have they worked with in the past? Why or why not did this work? • Also, I evaluate who else is being considered for my role (the short-listed competition).
<p>Key #1: Your fit with the key players and the organization's culture</p> <p>The lower your misfit (gap) with your key players and with the organization's culture, and ...</p>	<ul style="list-style-type: none"> • Directly affects my ability to lead and quickly engage participants, while challenging traditional assumptions held by the organization.
<p>Key #2: Your project challenges versus your skills, effort, and support</p> <p>The lower your misfit (gap) with the skills, effort, and support that you will</p>	<ul style="list-style-type: none"> • I rely on specific technical aspects of the work being provided by the organization and/or on SMEs who I identify and bring onto the project team. • I must quickly climb a steep learning curve related to the sector in which the organization operates. • Directly affects my ability to lead and quickly engage participants, while challenging traditional assumptions

Key	How each key generally works for me
<p>require to successfully address your project challenges, and ...</p>	<p>held by the organization.</p>
<p>Keys #7 and #8: Talk less and listen more for effective onboarding</p> <p>The better your onboarding into the organization, and ...</p>	<ul style="list-style-type: none"> • I try to listen <i>and talk</i> to convince the organization of what needs to be looked at. • I try to identify and listen to influential employees (may be positive or negative influencers) in confidential interviews I conduct as soon as possible and extend a bridge to those individuals. • I find the hidden, minority voices in the organization via confidential interviews as well. • I begin to develop a glossary of terms used within the organization and write them down explicitly. • I conduct a situation assessment (key sector trends, competitive benchmarking, internal assessment via confidential one-on-one interviews, strengths and weaknesses of the organization, articulate problem to be addressed) and test the findings with the project team (and others). • I re-evaluate (and re-negotiate) expectations, scope, and timelines for the project in light of the information gleaned above. • I come with a set of frameworks and processes to guide the work. • I rely on specific technical aspects of the work being provided by the organization and/or on SMEs who I identify and bring onto the project team. • Onboarding is typically a matter of 1 to 2 weeks in a project; consequently, I do not typically have 12 to 18 months to develop good relationships. • I also have a responsibility to onboard the client, introducing him or her to the process and collaborative approach to co-creating solutions. This tends to be a significant collaborative learning for the organization. • I must remain objective. • I must rely on my “anchor” to privately test ideas, perceptions, personalities, hot buttons, and terminology. • I incorporate feedback into every working session so that barriers and concerns can be identified and addressed early in the process. • I may be brought into an organization to change some aspect of the culture; consequently, I am <i>not</i> always concerned about my “cultural fit” with the organization.
<p>Key #3: Quality of your relationships with the key players and others</p> <p>The better your development of relationships with your key</p>	<ul style="list-style-type: none"> • I identify and nurture “anchors” (i.e., influential leaders) within the organization that give me the credibility needed to build trust quickly with others. • I must be able to read between the lines and sense emotions.

Key	How each key generally works for me
players and others in order to bridge the values gap with them and with the organization’s culture, and ...	
The greater the improvement in your skills, effort, and support to close the gap with what is required to successfully address your project challenges, and ...	<ul style="list-style-type: none"> • I come with a set of frameworks and processes to guide the work. • I rely on “anchors” to assist in the framing and interpretation of work and on specific technical aspects of the work being provided by the organization.
<p>Key #9: Leveraging organizational culture and managing conflict</p> <p>The better your results and the greater your other contributions to your organization as an individual contributor, and ...</p>	<ul style="list-style-type: none"> • I contribute to the work in a collaborative team effort. • To challenge and push thinking forward, I must be a master facilitator and resolve conflict.
<p>Key #10: Contributing as a leader, as a manager, and as an entrepreneur</p> <p>As a leader, a manager, and an entrepreneur, ...</p>	<ul style="list-style-type: none"> • My leadership role is important to the success of driving a project forward while gaining the trust and support of the organization. • I contribute to the work in a collaborative team effort, building capacity in leaders who will remain in the organization after I leave.
<p>Key #4: Your credibility</p> <p>The more your credibility will grow in the organization—feedback loop to your credibility when accepting a new project.</p>	<ul style="list-style-type: none"> • My credibility is critical to developing trust with the organization and matching my interests and passions. • Innovation occurs because I challenge the organization to push thinking forward.

In conclusion, being a sole operator has been extremely rewarding, despite the challenges described. It has required assertiveness, confidence, and strong leadership, alongside humility, empathy, and compassion. At times, projects have kept me awake at night, as I became part of the gridlock, fearing I may be creating more animosity than solutions. This is where a sole operator like me must exude self-confidence, dig deep, and listen, feel, and stick to his or her gut, knowing that if I weather the storm, the rain will bring sun. Being a sole operator of my type provides flexibility, and a freedom to choose projects that align with my values and evolving interests. With the variety of experience and exposure come numerous career and project opportunities such as Board work, senior management roles, and community leadership.

Appendix: My Background

Prior to becoming a solo operator, I was initially employed in a corporation, during which I changed jobs frequently in my first 5 years. Endeavoring to seek ever greater challenges, I held numerous positions, which ultimately provided me with experience in different aspects of management. I learned how to identify key messages and write speeches for senior executives as a communications

specialist. I set up an integrated medical filing system for 15 companies as assistant to the vice president. I developed fitness and health protocols for senior executives as a research assistant in Occupational Health and Safety. I developed policies and procedures for the newly constructed corporate fitness center for 4,000 members.

I transitioned to the Computer Services Department to develop policy and procedures for larger systems and more money. I supported the vice chairman of the chemical division as his executive assistant. And, finally, I entered the marketing department as a marketing analyst, tracking and evolving the strategy for high-density polyethylene.

After this 5-year stint, I came to the realization that I needed to acquire deeper academic knowledge, in order to put my experience in context and prepare myself for more complex situations. I moved to Switzerland to attain my MBA. Diploma in hand, my first job as a sole operator was as a marketing coordinator for Hewlett-Packard, followed a year later by senior strategic planner at NOVA Corporation.

As a proven strategist with over 30-year experience, I have led several high-profile transformations. Most notably, my work of restructuring the Calgary Philharmonic Orchestra while in bankruptcy protection earned a National Award of Distinction. I am a strong advocate for mentoring youth, and have founded Connections—Women in Business Round Table, to help young women succeed in business. After selling the management consulting business I started 25 years ago, I now operate solo.

I value my Certified Management Consultant credential. I took time out from my busy practice to undertake and compete, in 2012, an interdisciplinary PhD at the University of Calgary. My doctoral research focused on developing new tools for transferring knowledge and building organizational and leadership capacity. I am the author of multiple academic articles and co-author of a textbook on strategic planning. I have been a keynote speaker on topics such as leadership, strategic planning, change management, and knowledge management. And I have been a guest lecturer at The Peter F. Drucker and Masatoshi Ito Graduate School of Management. All of this has helped me to become a more reflective practitioner, and hence a more effective one.