

WORK, *YOUR* WAY  
PLAYBOOK

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# LET'S GET STARTED

You want to be a consultant, or you are one and want to take your game to the next level, stand out in the market and attract the right clients and do work that fulfills you. This playbook is your step-by-step companion guide to Part 2, *The Foundation in the Work, Your Way* book. Use this playbook to capture the answers to the questions. There are no right or wrong answers. This is all about YOU. This is a living playbook intended for you to refer to and update often.

We build your foundation, starting with defining your personal brand, then your ideal work, client, and rate. This phase is critical to invest in before jumping to the flywheel, so don't cheat yourself. Take your time. The foundation is yours alone to build. Once set, you will find it easier to thrive. Think of it like the foundation of a house—when stable and solid, the house will stand strong. If cracked, however, the house will not stand the test of time. Let's lay your solid, authentic foundation.

# BUILD YOUR PERSONAL BRAND



**BE YOURSELF. EVERYONE ELSE IS ALREADY TAKEN.**

ATTRIBUTED TO OSCAR WILDE

Your personal brand is an authentic reflection of you. It requires taking a moment to pause and reflect. It is internal work that can't be rushed and evolves over your lifetime.

It's about what you're really good at and what you love to do. I've advised many professionals with years of successful work experience who struggle with the idea of personal brand. What they don't realize is that they've already been building it along the way, intentionally or not. Personal brand is the combination of the work you do, your reputation, and the things that energize you. That is why choosing jobs you love where you can demonstrate success is so important, because you are building your brand every day.

**Your personal brand is your strength plus your passion.**





Answer these questions to help you understand your unique gifts and talents better so that you can build your personal brand statement.

**Be aware:** Who do I admire and why? What attributes do I admire? Could those attributes I admire in others be clues to what I want to be known for?

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**Be unique:** What is effortless for me? What am I the go-to person for?

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**Be confident:** Describe three memorable professional success stories. For each, write down some details to bring them to life: Where were you? What were you doing? What did you contribute to the project? What did you feel? What specific elements gave you the most happiness or pride? Wherever possible, pair those memories with specific metrics and outcomes.

1: \_\_\_\_\_

2: \_\_\_\_\_

3: \_\_\_\_\_

**Be teachable:** What is one area where I want to build my skills?

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**Be kind (to yourself):** What is the one thing I will do for myself every day to restore my energy and/or combat my inner critic?

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# AUTHENTIC WORDS

Think back to step one—be aware—and your list of qualities that you admire. Use that list as clues for what you want reflected in your personal brand. Which of those words you want to be known for? Are there any other words that resonate when you think about your authentic words? Write them down! Circle the top three that most resonate with you. These are your authentic words. Use them on your LinkedIn profile. Use them when you talk with a potential client or introduce yourself.

## PERSONAL BRAND STATEMENT

Put it all together with your personal brand statement:

**I am a <what> who <why>.**

Your *what* is the thing you do. Your title, role, or work. Often, it's how you already introduce yourself.

What people really want to know is your *why*. What's your motivation? Why do you do this work?

What makes it so meaningful to you?

I am a \_\_\_\_\_ who \_\_\_\_\_ .

### REFLECTION QUESTIONS

What are your authentic words?

What is your personal brand statement?

What are your professional success stories?

# DEFINE THE WORK THAT FITS YOUR LIFE



**THE ONLY WAY TO DO GREAT WORK IS TO LOVE WHAT YOU DO. IF YOU HAVEN'T FOUND IT YET, KEEP LOOKING.**

STEVE JOBS

I like to think of this process as a funnel. At the wide mouth is your personal brand work and what you accomplished in Chapter 3. There you're defining the broad strokes of who you are and what you want to be known for. As you travel down the funnel, you're narrowing in on the specifics of your ideal project, from the work to the logistics and the client and client company.

## PROJECT SPECIFICS

**Focus area:** Is there a specific aspect of your area of expertise that you want to focus on? Conversely, is there any area within your expertise that you do not want to work in?

**Strategic or tactical:** Do you want to set the strategic direction or execute against a strategy that's already defined—or both?

**Tools:** Do you enjoy learning new software and tools on the job or does that overwhelm you? What commonly used tools in your space are you comfortable with? Which would you need to learn before working with?

**Familiarity:** Do you want to work within a team, company, or industry that's familiar to you? Or do you enjoy immersing yourself in a new space and quickly learning what you need to be successful?

**Teamwork:** What team dynamic do you prefer? Do you want to work independently and share major milestones with the client along the way or within a highly collaborative team that's constantly sharing tasks and developing in tandem?

**Access:** How important is it to you that you get access to the team and leadership during the project? What level of support or leadership buy-in do you need to be successful?

**Impact:** Do you care how your project fits into the company's greater mission and vision? Do you want to work on projects that directly ladder up to the top business priorities or are you content building sites for art's sake?

**Purpose:** Do you need a project that aligns with your core values and worldview? Or is it more about the work?

### ADDITIONAL CONSIDERATIONS:

#### **Subcontractor (1099) or employee (W-2)**

Working alone as a subcontractor means that you are a business owner, not just a consultant. The good news? You are in charge. The bad news? You are in charge. You assume all the risk, and you are responsible for everything, including taxes, finances, operations, contracts, legal, business development, deployment, customer experience, and customer success of every single project. When you are your own boss, you get to choose what work you'll do, and you control everything from branding and scoping to delivery. You can choose to work alone or hire other people to grow the business.

However, the advantages of working independently can also be disadvantages. As a business owner, you are responsible for the administrative details of the business. You must allocate a portion of your time to non-billable activities including paying taxes, finding a bookkeeper, managing invoicing and collections, and finding work. For consultants who just want to do the work, these back-office tasks can feel tedious or daunting. As a subcontractor, you also forgo all the traditional perks of employment such as health benefits, 401(k) employer match, paid vacation, and more. Last, many subcontractors can feel isolated when working alone. Know yourself and consider how you work best.

**Full-time or part-time? Short-term or long-term contracts?** You must consider your preferences, life circumstances, and finances. Some enjoy variety and multiple part-time projects with many clients and others prefer one project and client at a time.

**Remote or on-site?** This is a combination of the client's needs and yours.

## **Independent or intermediary**

An intermediary is defined as a firm, agency, consultancy, or company where you are either an employee or a subcontractor. Some intermediaries hire you as an employee and place you on projects. Others provide invoice/payroll processing for you as a subcontractor or employee if you find your own work. In this scenario, you are not billing your client directly but instead through an intermediary. Many large corporations have established supplier programs with stringent contractual requirements so if you want to work for one of those clients then you will likely have to work through one of the approved suppliers, which acts as an intermediary. In this example, every supplier has a different business model and approach to what they offer consultants, so it's important to do your homework and learn which is the best match for you.

### **Ideal client profile:**

What are the values of your ideal client?

What companies do you admire and want to support?

What size of company do you want to work with?

**Think about your network:** Who knows about your skills? Who is in your fan club? Who is doing work that's interesting to you? Who respects you and shares similar values?

# BONUS EXERCISE!

In chapter 6, we review how to land a contract. These questions are from that section to help you put your ideal client list into action!

## CLIENT A & B LISTS

**BUILD YOUR LISTS** Work your network. The goal is to sort your network into two categories of possible clients. Do not prejudge anyone, and don't overthink it. Complete the lists as fast as you can. It's always good to have more people than you need to contact. **A List:** People you know and like. They are part of your personal fan club and they know your work and your greatness. Even if they don't have budget or a current business need, they will happily go out of their way to refer you. Remember, this list doesn't have to be very long! **B List:** Acquaintances and new companies and clients who ideally share your values.

**PLANT SEEDS** **A List:** Start here. Craft personalized emails to your top warm leads. Share that you are looking for contract work and provide a short description of your personal brand and the kind of project you're looking for. **B List:** Leverage LinkedIn and your network to build relationships. Search LinkedIn for other professionals who match your target client profile and even filter for the companies you want to work with. Identify who in your network is connected to the people you would like to meet. To connect, ask your mutual friend to make a warm introduction, or reach out directly with a short personal note. Clearly articulate your request and pair it with an equally clear and concise description of who you are and what you're looking for.

## REFLECTION QUESTIONS

**Let's build your dream project.**

**Do the work you love...**

What is your personal brand? What are your strengths and passion?

**However you love to do it...**

Do you want to work part-time or full-time? Remote or on-site?

Alone or through an intermediary? As an employee or a subcontractor?

**For whom you like...**

What are the values of your ideal client? What companies do you admire and want to support?

# MASTER THE ART OF THE RATE



**KNOW YOURSELF. KNOW YOUR WORTH.**

ANONYMOUS

I call this chapter “Master the Art of the Rate,” because determining your bill rate and pay rate as a consultant is an art, not science. Many factors influence the right number for you, and they may change over time. Money is just one part of the equation. A host of other highly valuable intangibles are difficult to place a price tag on. My goal is to give you the knowledge to go out into the market with confidence and earn what you deserve for your skills, experience, and the work.

## KNOW YOUR MARKET VALUE

While no one source is perfect, it’s helpful to use free and transparent tools to build an informed pay estimate. Online resources, such as PayScale, Salary.com, Glassdoor, or Indeed, will help you get a sense for what someone with your skills earns in your local market. For example, I like to start with an online search for a generic title in my local market, such as “marketing manager salary in Seattle.” The search may reveal a broad range of salaries. While this isn’t perfect, it does provide visibility into local numbers for that type of work, and you should immediately see a spectrum start to take shape. I usually do several searches with a variety of titles based on my experience to educate myself on what the market is paying.

Then, to really get a good handle on what market rates are for your skills, talk to people you know who are doing the kind of work you want to do at your target companies and inquire about their salary range. You can also apply for positions and go through a traditional interview process to learn about their pay ranges. Every city is different, and it’s important to do the research on a consistent basis to ensure you are being paid fairly and that you have a pulse on the market.

You are collecting multiple data points to help you form a realistic expectation for your bill and pay rates. It’s important to conduct this exercise every couple years or so, as local markets change. You may also see that the market and what you need to earn are at odds. This discovery may motivate you to research which high-demand roles pay more and proactively build your skills in another area.

## DATA POINTS ABOUT MY MARKET VALUE

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_
- 4: \_\_\_\_\_
- 5: \_\_\_\_\_

## ESTABLISH YOUR PAY RANGE

A pay range allows you to accept the right projects based on your low and high rate requirements. Identifying your pay range will empower you to feel in control of pricing and give you the confidence and flexibility to know you are getting paid what you deserve and desire.

**Calculate your baseline:** This is the low end of your range. Determine how much you need to live per month, including rent or mortgage, insurance, car payments and gas, childcare and schooling, cell phone and internet, utilities, entertainment, savings, incidentals, and any other foreseeable expenses: \$\_\_\_\_\_.

**Define your ceiling:** This is the high end of your range based on what you have learned about your market value for your skills, experience, prior work, geography, etc. \$\_\_\_\_\_.

## VALUE YOUR INTANGIBLES

Money is important, but there are so many other factors to consider when taking on a project. I call these the intangibles, and everyone places different value on them. Intangibles include work schedule, logistics (such as remote, on-site, or hybrid), the people you work with, the skills you learn, the company, and networking opportunities, to name a few.

**What are the top intangibles for you right now?** What considerations—anything other than money—factor into your decision to take a project or not?

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_
- 4: \_\_\_\_\_
- 5: \_\_\_\_\_

### REFLECTION QUESTIONS

What is your ideal pay range?

What is the market value (bill rate) for your skills/expertise?

What intangibles are just as important to you as money?

And just like that, you have built your foundation! You defined your personal brand, complete with your authentic words, success stories, and a clear, compelling personal brand statement. You identified the ideal work, work environment, and client for you. And now you know how to think about ideal pay range and market value. I hope you are feeling confident and credible. If you aren't, then review Part II again and focus on the questions that are unclear for you. Take as much time as you need to build your foundation. Don't rush it. You are creating a strong structure.

In Part III, you will use your foundation to spring into action. I'll show you how to build your flywheel momentum—from landing the contract and delivering excellence to carving out time to reflect and refresh. Keep reading *Work, Your Way* as you continue your path to success.



**LET YOUR LIGHT SHINE.**

**THE WORLD NEEDS IT,  
AND SO DO YOU.**



LISA HUFFORD is founder & CEO of Seattle-based Simplicity Consulting, helping leading brands like Microsoft, Amazon and T-Mobile access the right marketing, communications, and project management talent at the right time to accelerate their growth. Founded in 2006, our mission has always been to help everyone thrive in the new world of work.

Simplicity has been an Inc. 5000 fastest-growing private company in America for five consecutive years and recognized by Puget Sound Business Journal as one of the largest woman-owned business in Washington state. Lisa has been named an Inc. Top 10 Female Entrepreneur and selected as an Ernst & Young Entrepreneurial Winning Woman. She's a champion for professionals transitioning to consulting and advises companies on building flexible, project-based teams that add immediate value, as discussed in her three books: *Navigating the Talent Shift: How to Build On-Demand Teams That Drive Innovation, Control Costs, and Get Results*, *Personal Brand Playbook*, and *Work, Your Way: Reinvent yourself, Create the Life you want and Thrive as a consultant*.

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