

Organizing for Sole Proprietors

Submitted by Jen Ulrich, Answers to Organizing

At the August 26th, I was a panelist at the RPCN (Rochester Professional Consultants Network) speaker meeting, discussing the important of having a "Board of Advisers" when working as a sole proprietor. My Board of Advisers includes three dynamic women with very different styles, business focus, and strengths. We meet every Monday morning (with very few exceptions) to share our plans for the coming week, ask for support and give suggestions on troublesome business issues, and help each other to be accountable for our respective business goals. We call this gathering the Accountability Group.

Members of Friday's RPCN audience offered some of the challenges they face as small business owners, such as isolation; knowing what equipment to get; learning how to market the business, write a proposal or attract new clients. These and many other issues are discussed at the monthly Business and Technical Forums at RPCN. But our Accountability Group goes several steps further; we go beyond the "how to" steps and help each other develop action and implementation plans that are specific to our businesses. Equally important, we focus on a timeline to ensure the project actually gets done.

For me, the other members of the Accountability Group are my partners in business (not to be confused with business partners.) They hold a vital role in the success of Answers To Organizing. They are:

Lori Cohen, Compass Quality Solutions - Lori works with small- and mid-sized companies to achieve ISO 9001 Quality Management Certification.

Linda McQueen, Business to BEST Consulting - Linda employs efficiency principles, solutions, and technology to turn a business's vision into reality.

Beth Sears, Workplace Communication, Inc. - Beth improves individual and organizational performance by helping build better relationships through open communication.

If you would like to create your own support team, the following guidelines may help you get started:

- Determine the size of the group - We've found four is the perfect size to allow everyone time to present and discuss issues. Pick whatever number you feel can be handled in the time allowed for meetings, but start small; you can always grow larger if desired.
- Set the parameters for the group meetings: where, when, frequency. As I mentioned, we meet every Monday from 9-11 a.m. at a local coffee shop

centrally located for all four of us. With some exception for special gatherings, we found one set time, day, and place is really the only way to go to avoid confusion.

- Table stakes - Mutual respect, honesty, confidentiality, willingness to share, and a desire to learn. To avoid conflict of interest, it probably is best not to have more than one member in a specific field of expertise or industry.
- Compatibility - This doesn't mean you all think alike; quite the opposite. In our group, we have introverts and extroverts, global thinkers and process professionals alike. What compatibility means in this context is people you can relate to, listen to, and with whom you enjoy spending time. Yes, we are business focused, but we have fun too. We genuinely care about each others' success, both professionally as well as personally.
- No dues - Start-up companies and small businesses have enough expenses to deal with. What we are doing is making an investment of time to ourselves and each other that truly pays off.
- Require commitment from all members to attend all meetings. Naturally vacations and illness are understandable. Most of my clients are consumers, whereas clients of the other three business owners are primarily other businesses. And in the business-to-business world, sometimes the client drives the dates of activities. But actually, it's fairly rare when one of us has to be absent from our Monday meeting. Because we have built strong bonds of respect for each other, we accept these infrequent and unavoidable absences willingly.

So the next logical question is, "Where do I begin?"

- Pay attention to the people around you when attending other group meetings or networking. Who interests you? Who is knowledgeable in an area you'd like to know more about? Who do you get along with?
- Invite one person to coffee to get to know that individual better. If that person seems compatible to your style, open the conversation about forming an accountability group.
- Come to agreement on the parameters of the group. As you consider others for membership, these will be the pre-established arrangements they will have to agree to before joining.
- Discuss who else might be a good fit for your Accountability Group. Schedule separate one-on-one meetings; keep in mind, this is not an invitation-to-join meeting, just a get-to-know-you session.
- Next, discuss with the other member whether or not you both agree that the person is a good fit. If yes, extend an invitation to join your group. If not, there's no harm done; you've expanded your network which always is good.
- When you've reached three members (or when a vacancy needs to be filled), you can begin inviting other prospects to visit your meeting to share about their business with the group. Later, repeat the step above.

As Lori, Linda, Beth and I shared with the RPCN group on Friday, being a member of this Accountability Group has made an invaluable impact for each of us in being more

knowledgeable business professionals, working smarter and more efficiently, and raising our standards of accountability not only to ourselves and each other, but to our clients as well.

Jen Ulrich, owner of Answers To Organizing and blogger for the "Democrat and Chronicle," is a professional organizer. She guides clients in the process of transforming their environments from cluttered settings to comfortable ones. In the past six years, she has recovered nearly \$18,000 for her clients in their homes or small offices.