



Case study- Letter to Shefali

Coaching and mentoring can be done long distance too; here is an example of how it can work.

Shefali and I correspond regularly about how best to deliver the objectives of her humanitarian charity. We communicate on plans and tactics to achieve this. I am a sounding board for her thoughts on developing options, advice on business planning and she sends me drafts for comment. We can use the inbuilt difference in time zones to our advantage, there is time to really think before responding to requests for advice' yet when we need to speak instantly she stays up late or I get up early.

This is how the discussions began, taken from our correspondence late last year. Shefali had announced that she had resigned her job and was going freelance, using the platform of an existing charity to do her work. She is a brilliant, committed and respected professional but had never been self employed or run her own enterprise before.

'Dear Shefali,

I was so pleased to hear you are setting up a new venture, and that you have two career buddies to do this with. So you have taken the plunge? As your 'elder sister' I always worry when you do not ask for advice in advance, so I decided to give you some anyway. I have been working with some amazing people who have faced these start up challenges and this unsolicited missive is based on a mix of their learning and my own!

A shared narrative:' Firstly, it is great that you are breathing new life into the existing charity and delivering on its core purpose. Through the charity, you already have a track record of influential work and an existing legal entity. This means you do not have to decide on a company structure, but you will need to tell the story about why the enterprise been 'sleeping' for a while and what you want to achieve now.

Team Roles: Have the three of you sat together, and had a long discussion about this? Do your two colleagues assume that you will lead the venture (as I suspect you do)? But, spend time working through your, and what are respective roles, remembering to play to your respective strengths; ideally you will have a good mix of skills. What skills are you missing and how will you cover for this?

Practicalities. Here are some immediate thoughts that occur to me:

Are you each going to be employed by the Charity or self-employed?

Do you have the right insurances in place? (Not sure how this works in your country)

Are you going to reopen your office or work from your homes? Good idea to keep your overheads as low as possible but to invest time in communicating.

Ownership: as it's a charity you do not need to think this thorough in such detail though you could also think about becoming a social enterprise with more of an emphasis on traded services (your combined skills), and not just reliant on grant income.

I am assuming the existing trustees are fully supportive of the exciting plans you have to enliven the charity and expand its work. How will you address any concerns they may have? Are they all still willing to be active, do you need others with contemporary experience?

Returns

You say you have your first commission, wonderful! Now, this is the moment to think through the proportions by which you each get paid and what percentage goes into the charity. Do your own action research on this as you go along, what are you learning? Capture the time you are each really spending against what you estimated, did the allocation of work feel fair, and above all is the client satisfied enough to write you a good testimonial and be willing to commission you again.

Work life or life work?

Why is each of you up for these at this point in your lives, are you each equally committed? Is the financial return vital to each of you in equal measure?

How will you manage the work life balance, you say you want more flexibility, but how many days are you each able to truly commit? You, above all know how life intervenes, will you be able to cover for one another? What will you do if one if you think something is unfair and that one or more of you is putting in more effort than the rest? How much work do you need to generate to demonstrate your success?

Your reputation:

Leave well: Remember to effusively thank your former employer, they have been very flexible and given you 'breaks' that you may underestimate the importance of right now. Ideally they are already offering to assign pieces of work to you and your new team. Have this discussion; also check that you are not bound by any contractual obligations about not approaching customers of your current employer. What misgivings might they have and how can you reassure them? I suggest that you (all) promise to credit the organisations that you worked for before with work you did on their behalf.

Your order book:

Who else might give you work in this first year to get you going? You need to build a good set of accounts and impressive list of clients in this new (first) year. Will you do some pro bono work to build your reputation?

So much more I could say but does any of this ring true? Happy to write or Skype about this and to stay in touch as your exciting venture goes live.

Sincerely yours,

Sue"

Postscript: Shefali is developing an effective practice, building solid partnerships to deliver better lives for very vulnerable individuals. Two of the colleagues decided not to commit full time to the enterprise but are supporting in

other ways. She and I communicate as regularly as a 'sounding board' is needed, in time to have 'what if' conversations before fixing on an approach.