Today’s presentation is coordinated with IEEE-USA’s AICNCC
- There are over 40 Consultants Networks (CNs) throughout the US and in a few other countries

Today’s presenters are from the Consultants’ Network of Silicon Valley (CNSV)
- Some best practices that are used by CNSV will be presented to assist other CNs to achieve more success
Today’s Presenter

- Brian Berg
  - Owner of Berg Software Design
  - A technical consultant for over 40 years
  - Specialties: data storage, flash memory, and consumer electronics hardware and software
  - Expert witness in intellectual property cases
  - IEEE Consultants’ Network of Silicon Valley:
    - Director, past Chair, and officer since 2006
  - Past IEEE Santa Clara Valley Section Chair
  - IEEE History Committee member
    - Involved with over 24 IEEE Milestones
Best Practices for Running a Successful Local Consultants’ Network

an AICNCC Virtual Meeting

Brian A. Berg
with Tom Coughlin and Joel Kent
of the IEEE Consultants’ Network of Silicon Valley (CNSV)

28 September 2022
Best Practices for Running a Successful Local Consultants’ Network

Agenda

1. Brief Overview of a Consultants’ Network (CN)
2. Details about a successful CN:
   – Consultants’ Network of Silicon Valley (CNSV)
3. Summary of key steps in establishing a successful CN
4. Q&A
Best Practices for Running a Successful Local Consultants’ Network

Part 1: Brief Overview of a Successful a Consultants’ Network (CN)
Best Practices for Running a Successful Local Consultants’ Network

Brief Overview of a Successful CN

- Biggest benefit of CN membership
  - Exposure to potential clients
  - You need to get paid!!

- How can a CN get exposure and success?
  - Plan meetings around potential clients
  - A website that promotes members’ skills
Best Practices for Running a Successful Local Consultants’ Network

Brief Overview of a Successful CN (cont.)

- The most important things for a CN:
  - Having a membership!
  - Organize meetings that will draw potential clients

- A group of active members
  - Officers: Chair, Vice Chair, Secretary, Treasurer
  - Volunteers to plan meetings
  - Website with a webmaster

- How many meetings per year?
  - At least 4
  - Optimally once/month (skip summer months)
Best Practices for Running a Successful Local Consultants’ Network

Brief Overview of a Successful CN (cont.)

- Biggest benefit of CN membership
  - Exposure to potential clients – you need to get paid!!

- How can you use a CN to get that exposure?
  - Plan meetings around potential clients
  - Have a searchable website with member webpages

- Get speakers from interesting companies
  - The speaker might be looking for consultants
  - Attract attendees who might be looking for consultants

- Bottom line: attempt to create synergy by attracting a broad range of attendees to your meetings
Best Practices for Running a Successful Local Consultants’ Network

Part 2:
An Example of a Successful CN:
Consultants’ Network of Silicon Valley (CNSV)
Best Practices for Running a Successful Local Consultants’ Network

Example of a Successful CN

- Consultants’ Network of Silicon Valley (CNSV)
- Established in 1993
- A very basic website first existed in around 1996
- I joined in 1998, when its membership was about 30
- I became Chair in 2006
  - Membership was at 67
  - My primary goal was to modernize the website
  - A new site was up by April 2006, with a website search box
  - It allowed members to maintain their own profile page
  - It allowed jobs to be posted and sent to each member
  - Our membership reached 204 members in late 2010, a 3x increase in 5 years

A good website is Key to the success of a CN!
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV

- Board of Directors
  - 4 elected (Chair/Vice Chair/Secretary/Treasurer)
  - Up to 6 Directors (generally past Chairs)
  - Up to 6 At-Large Directors

- 200 members
  - 86% are IEEE members
  - Members are in 17 states, not just Silicon Valley

- Annual dues: $50
- Website: CaliforniaConsultants.org
Best Practices for Running a Successful Local Consultants’ Network

CNSV Elected Officers

Thomas M. Coughlin, Ph.D., IEEE Life Fellow
Coughlin Associates, Inc.
tom@tomcoughlin.com
Bus. Phone: 408.202.5098
CNSV Chair
IEEE Life Fellow

David M. Snyder, MBA, PE, CISSP, CSSP
42TEK LLC
david@42tek.com
Bus. Phone: 415.378.4160
Fax: 415.946.3318
CNSV Secretary

John R. Carlsen
Syncopated Systems
cnsv@syncopate.us
Bus. Phone: 408.207.7673
CNSV Vice Chair
IEEE Senior Member

Paul G. Jensen
Software Consultant
pgj@acm.org
Bus. Phone: 628.232.0848
Mobile: 650.766.1950
CNSV Treasurer
Best Practices for Running a Successful Local Consultants’ Network

6 CNSV Directors:

Brian A. Berg  
Berg Software Design  
bberg@StanfordAlumni.org  
Bus. Phone: 408.741.5010  
Mobile: 408.568.2505  
CNSV Director  
IEEE Senior Member  

David Chapman  
Chapman Consulting  
dcchapman@acm.org  
Bus. Phone: 408.828.6467  
Mobile: 408.828.6467  
CNSV Director  
IEEE Senior Member  

Joel Kent  
Joel Kent Consulting  
joel.kent.137@gmail.com  
Mobile: 650.521.7889  
CNSV Director  
IEEE Member  

Kim Parnell, Ph.D., P.E.  
Parnell Engineering & Consulting (PEC)  
kim.parnell@stanfordalumni.org  
Bus. Phone: 408.203.9443  
Mobile: 408.203.9443  
CNSV Director  
IEEE Senior Member  

Joel Williams  
Embedded Linux Design Services  
joel@emlinux.com  
Bus. Phone: 408.249.5574  
CNSV Director  
IEEE Life Senior Member  

Chris K. Wilson  
Christopher Wilson Consulting  
chris@cwcons.com  
Bus. Phone: 650.867.2621  
Mobile: 650.867.2621  
CNSV Director  
IEEE Senior Member  

2 CNSV At-Large Directors:

Michael N. Gershowitz, P.E.  
Michael N. Gershowitz, PE  
mike@gershowitzconsulting.com  
Bus. Phone: 408.623.6837  
CNSV At-Large Director  
IEEE Member  

Andrew Wolfe, Ph.D.  
Wolfe Consulting  
awolfe@awolfe.org  
Bus. Phone: 408.394.1096  
Mobile: 408.394.1096  
CNSV At-Large Director  
IEEE Fellow
Elected officers:
- Each has a role to play
- Max term is 2 years to ensure new faces in this role
- Chair: run monthly meetings, oversee activities
- Vice chair: they often take on some new task
- Secretary:
  - Take monthly meeting minutes
  - Get approval of previous month’s minutes at each meeting
- Treasurer:
  - Present monthly financial report at each meeting
  - Write checks
  - Handle receipt of annual renewal payments
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- Board Directors (max: 6)
  - Currently 6 Directors
  - Most are past CNSV Chairs
  - Their history with CNSV ensures continuity

- Board At-Large Directors (max: 6)
  - Currently 2 in this role
  - Appointed by the Chair
  - They will often take on a new task
  - They are a potential future elected officer candidate
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- Monthly Board meetings
  - 10 annual meetings (monthly except summer)
    - Before COVID, 3 of 10 meetings annually were in-person
    - During COVID, all were on Zoom
    - 2022: 1 in-person Board meeting so far
  - Nearly every Board member attends each meeting
  - Numerous topics to discuss
  - Monthly meetings ensure that things don’t fall through the cracks
  - Social aspect: we are all friends!
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- Board meeting agenda includes:
  - Secretary’s presentation of minutes
  - Vice Chair’s report re: any tasks he/she has taken on
  - Treasurer’s report on finances
  - Membership report:
    - New members and their background
    - Status of renewals (early in each new year)
  - Program report re: monthly meeting speaker status
  - Committee reports
  - Updates re: discussion at the local Section meeting
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- CNSV has a number of committees
  - Consulting Practices Program (CPP)
    - Periodic 3-hour event on a Friday or Saturday morning
    - Recent examples:
      - The business of being a consultant
      - Tax planning
      - Working as an Expert Witness
  - Special Interest Groups (SIGs)
    - These come and go depending on interest/volunteer availability
      - AV SIG: Autonomous Vehicles
      - IP SIG: Intellectual Property
      - MED SIG: Medical Devices
    - Periodic SIG meetings precede monthly speaker meetings
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- We have monthly meetings on a variety of topics
- **Note that CNs have a big advantage over Society chapters:**
  - Any technical topic can be a meeting topic!
  - Topics on consulting itself is also fair game
- When we meet in person, we are at the world HQ of SEMI, a 2000-member global coalition of electronics manufacturers
  - We have to rent the room, but it seats 100 and has good A/V gear
  - We serve free pizza and drinks, which helps draw a crowd
  - Member fees underwrite food; we get a mix of consultants, potential clients, and potential new members
Best Practices for Running a Successful Local Consultants’ Network

Overview of CNSV (cont.)

- Our in-person monthly events attracted 40-100 attendees
  - A wide variety of speakers has always been a good draw
  - Free food and drink are a big help as well
  - We allow our members to give a 20-second elevator speech before the event (this should be memorized)
  - We ask the audience if anyone is looking for a consultant
  - We post the slides for each talk on our website
    - Our event postings go back to 2006 and earlier

- Our virtual events now attract 80-180 attendees
  - We post both the slides and a video of each virtual event

- Our website thus covers a very broad range of topics
Examples of the variety of 2022 meeting topics:

- **Chip Architecture Trends in 2022**
  Sharan Kalwani, DataSwing Corp.
  TUESDAY, JUN 14, 2022 - 7:00 PM TO 9:00 PM

- **Artificial Intelligence and Aging**
  Dr. Ronjon Nag, R42 Institute and R42 Ventures
  TUESDAY, JAN 11, 2022 - 7:00 PM TO 9:00 PM

- **Orbital Reef: A Space Station for a New Economy in Space**
  Ken Shields, Sierra Space Corp.
  TUESDAY, MAR 8, 2022 - 7:00 PM TO 9:00 PM

- **The Future is Written in DNA: Data Storage for the Next Millennia**
  Daniel Chadash, Twist Bioscience
  TUESDAY, MAY 10, 2022 - 7:00 PM TO 9:00 PM
Best Practices for Running a Successful Local Consultants’ Network

Joel Kent
- CNSV Director, past Treasurer, and officer since 2019
- Seasoned applied physicist
- Inventor of over 100 patents, including touch sensors
- Joined CNSV while still employed, with the goal of becoming a consultant
- Became a full-time consultant in 2017
- Senior IEEE Member
Best Practices for Running a Successful Local Consultants’ Network
CNSV’s Feb. 2022 Monthly Meeting

We had a panel of 5 BOD members speaking:

- The inspiration was desire to share insights of CNSV members with potential next generation consultants.

Talk content evolved greatly in light of thoughtful BOD discussions.

Talk aimed at those deciding whether to become a consultant. More about why to consult rather than how to consult.
Best Practices for Running a Successful Local Consultants’ Network
CNSV’s Feb. 2022 Monthly Meeting (cont.)

Presentation included general advice ...

- Consulting can provide opportunities for an interesting career
  - An opportunity to see many different work environments
  - The “2 out of 3” Formula: you can often have 2 of 3 needed skills for a job, and learn the 3rd during consulting gigs

- Personality red flags
  - Difficulty selling yourself

... and case studies based on the panelists.

Each panelist presented several slides.

Consulting Career Case Study #2
A career of great variety and independence

Consulting Career Case Study #1
An intellectually and financially rewarding career

A case study of a career built on consulting

- Transitioned to consulting at age 32 after start-up folded
- Advanced networking technology via embedded systems code
  - Also contributed to robotics
- Now an expert witness

Career built on consulting
Consulting at height of career
Consulting as semi-retirement

Valued IEEE-CNSV benefits: 
- Consulting partnerships
- Referrals to clients
- Commodity of consultant network

Fun anecdotes:
- Close relationship with Computer History Museum
- Have interviewed pioneers of many breakthrough technologies including Google Maps, Mars Rovers, Shakey the Robot, CDMA, ...

Valued IEEE-CNSV benefits:
- Consulting partnerships
- Referrals to clients
- Commodity of consultant network

Fun anecdotes:
- Wrote SW control for big robot bending equipment
- Wrote early robot arm code for silicon wafer handling
- Expert witnesses make $400 or more per hour

Preparing at 2015 Beijing Flash Memory Symposium

Career timeline of an IEEE-CNSV member (JW)
Best Practices for Running a Successful Local Consultants’ Network

CNSV’s Mentorship Program

CNSV Announces a new Mentoring Program

CNSV has a new free Consulting Mentor Program, matching interested mentees to experienced mentors. More information →

Consulting Mentoring Program (CMP)

Find a Mentor

Connect with other consultants one-to-one.
Learn how they operate and how you can expand and improve your consulting practice.
If you are thinking of starting a consulting practice, a mentor can advise on how to begin.
If you are already consulting, you can expect advice specific to you on how to develop and hone skills in specific areas such as:

- Marketing your services to find new clients – branding, market positioning, marcom.
- Making sales – how to engage and close on a consulting contract
- Maintaining and expanding client relationships – how to identify additional work within your client base
- Expand and maintain your consulting network
- Business structure: incorporating/sole proprietor, business software, finance management, licenses, insurance, etc.

Program thanks to initiative of CNSV member Joel Williams.
Best Practices for Running a Successful Local Consultants’ Network

Tom Coughlin
- CNSV Chair, and CNSV officer since 2016
- Technical consultant for over 25 years
- Expert in digital storage and memory
- Past Chair of Santa Clara Valley Section
- Past Region 6 Director
- Past IEEE-USA President
- Current IEEE President-Elect candidate
- IEEE Fellow “for leadership in consumer electronics digital storage technology”
Best Practices for Running a Successful Local Consultants’ Network

CNSV’s Philanthropy, & 4 Meetings in Sept. 2022

- CNSV was Platinum Sponsor of the 2022 Global Humanitarian Technology Conference (GHTC)
  - This brought the MOVE truck west to Santa Clara University
  - Sponsored 2 of our evening meetings at the GHTC, one on diversity in the workplace and the other on Communications, Computing and Power during Disaster Response
  - We also organized two other sessions during the event
Best Practices for Running a Successful Local Consultants’ Network

Other CNSV Activities

- Advocating for Consultants
  - Ongoing survey on the impact of CA AB-5 on Consultants
  - Hosting IEEE-USA Washington Updates from Russ Harrison
  - Active in the IEEE-USA Congressional Visits Day (CVD)

- Conference Participation & Sponsorship
  - Flash Memory Summit (Aug 2-4, 2022) Santa Clara Convention Center  FlashMemorySummit.com
  - IEEE Global Humanitarian Technology Conference (GHTC) at SCU in September (Sep 8-11, 2022) IEEEghtc.org as discussed earlier

- IEEE Milestone Program
  - CNSV donated a Milestone bronze plaque to the Computer History Museum for the SPICE circuit simulation s/w
    - SPICE was developed by CNSV past Chair Larry Nagel while he was working on his PhD at UC Berkeley
Best Practices for Running a Successful Local Consultants’ Network

CNSV Website: Member Profile Page

- A key CNSV member benefit is a website profile page
- This can be edited by the member to include a description of technical skills, your photo, relevant videos, and links
- This screenshot shows the top portion of my profile page:

Brian A. Berg
Berg Software Design
bberg@StanfordAlumni.org
Bus. Phone: 408.741.5010
Mobile: 408.568.2505
CNSV Director
IEEE Senior Member


14500 Big Basin Way, Suite J
Saratoga, CA 95070-6076

Brian is an independent consultant with extensive experience with storage devices and interfaces, including Flash Memory, Disk Drives, RAID/Disk Arrays, Optical Storage (CD-ROM, DVD, WORM, Magneto-Optical, Content Scramble System-CSS), Tape, Storage Area Networks (SAN), and USB, SCSI, iSCSI, SAS, Fibre Channel and SATA/IDE/ATA/ATAPI. He has performed device tear-downs in order to study the workings of a number of consumer electronics devices, and has studied the operation of Kindle and Nook e-book readers.
Best Practices for Running a Successful Local Consultants’ Network

**CNSV Website: Search Box**

- A key CNSV member benefit is the website search box which is available on every CNSV webpage:

  ![Search Box](search-box-image.png)

  This search box will search all member profiles, events, articles, white papers, and blog entries on the website.
Best Practices for Running a Successful Local Consultants’ Network

CNSV Website Platform Overview

- Website built on WordPress website and blogging platform
- A WordPress database maintains much of the content
- WordPress Toolset used to simplify page creation
- PHP code used for some special functionalities
- WP Rocket caching speeds up heavy content pages
- Several other plugins are also used
- All part of CaliforniaConsultants.org
- Jeff Safire is our Webmaster
Best Practices for Running a Successful Local Consultants’ Network

Other CNSV Member Benefits

- Email listservers:
  - All CNSV members are subscribed to a member email listserver which allows access to the entire membership.
  - Examples of recent postings include these:
    - Recommendations for a CPA; and for business insurance
    - Medical device company looking for consultants
    - Assistance needed for a BitTorrent issue
    - Broadband and fiber communications consultant needed
  - A true network of consultants who can query each other and get numerous responses is a valuable resource!

- A listserver with >4000 subscribers promotes meetings
- The Board of Directors also has a listserver
Best Practices for Running a Successful Local Consultants’ Network

Part 3:
Summary of Key Steps in Establishing a Successful CN
Best Practices for Running a Successful Local Consultants’ Network

- **Point 1: What is the goal of a good CN?**
  - Create opportunities for consultants to meet potential clients

- **Point 2: How do you build a successful CN?**
  - Start with a strong Board of Directors
  - Hold meetings with interesting speakers

- **Point 3: How do you build a strong Board?**
  - Start with seasoned consultants
    - Seasoned consultants know how to seek out jobs and get paid
    - They are able to self-manage, and so can manage others
    - They likely have a good set of connections built up over time
  - Meet at least 5 times each year
  - Define responsibilities for each Board member
Best Practices for Running a Successful Local Consultants’ Network

Point 4: How do I plan Board meetings?
- Chair will create an agenda for the meeting
- Key agenda items:
  - Planning speaker events
  - Publicizing the events (IEEE vTools is a good method)
  - Increasing membership

Point 5: How do I find an event venue?
- Find an active local IEEE member and see if his/her employer will host your events
- Find an interesting speaker and see if his/her employer will host your events
- Having a consistent venue helps attract attendees
Best Practices for Running a Successful Local Consultants’ Network

Point 6: How do I plan event meetings?

- Find an interesting speaker
- Interesting speakers can attract an audience in 3 key areas:
  - Consultants
  - Potential CN members
  - Potential consulting clients
- CN members can be a speaker/speakers can become a CN member
- Include a social time to allow the audience to interact
- Ask the audience if anyone is looking for a consultant
- CN members can give their elevator speech (a 20-second summary of their skills, as if in an elevator)
  - This must be practiced to be effective!
Best Practices for Running a Successful Local Consultants’ Network

Point 7: How do I publicize my events?
- Using vTools to invite members in your section is a start
- As you grow, keep a record of all attendees and create an email listserver
  - this will allow you to attract an increasingly broad audience
- Social media is another good tool

Point 8: Should my CN charge an annual fee?
- Only if you graduate to a sophisticated CN that can provide true value for this fee
- Fees allow you to maintain an effective website
- You can offer free food and drink at meetings to attract a broader audience
- You can sponsor larger scale events which gain your CN wide exposure, which benefits your members
Best Practices for Running a Successful Local Consultants’ Network

Part 4: Q & A

(Contact Brian Berg at b.berg@ieee.org)