

# *A Consulting Startup Journey*

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AUSTIN, TX  
APRIL 23, 2010



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# Journey

- ◆ Introduction/Background
- ◆ Purpose
- ◆ Formation
- ◆ Organization
- ◆ Marketing
- ◆ Learning
- ◆ Support
- ◆ Tools (Examples from Handout)
- ◆ Retrospective
- ◆ Suggestions
- ◆ Q&A



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# Background

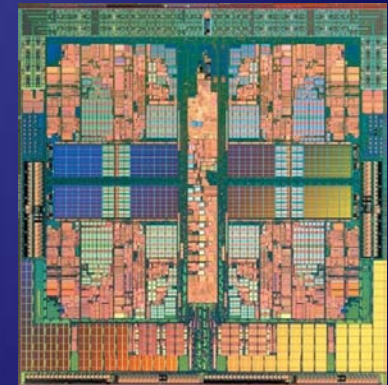
## ◆ Experience

Education

- ◆ HS: Math and Science – Hong Kong
- ◆ College :
  - ◆ Computer Engineering – Univ. of Illinois
  - ◆ Executive MBA – Univ. of Oregon

Engineering

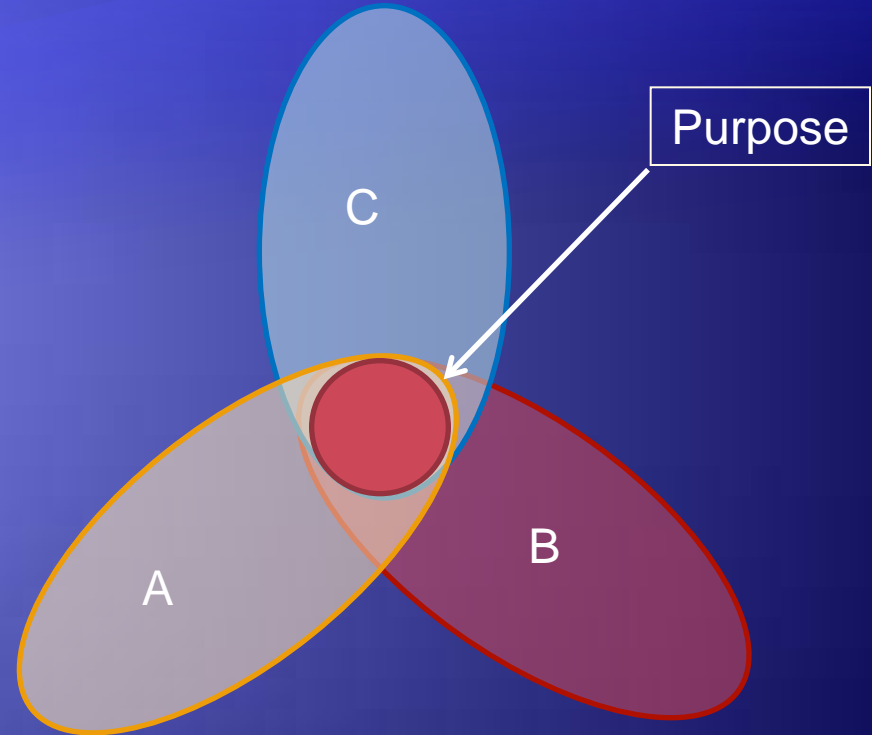
- ◆ First Job : Design Supercomputers @ CDC/ETA
- ◆ Startups : GE (3D graphics), PowerPrecise (Power mgmt IC's),...
- ◆ Medium/Large : AMD (Barcelona), Intel (Itanium), ...



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# New Direction

- ◆ Purpose Driven Life
  - ◆ Passions/Interests (A)
  - ◆ Skills/Experience (B)
  - ◆ Needs of the World (C)



## Sources:

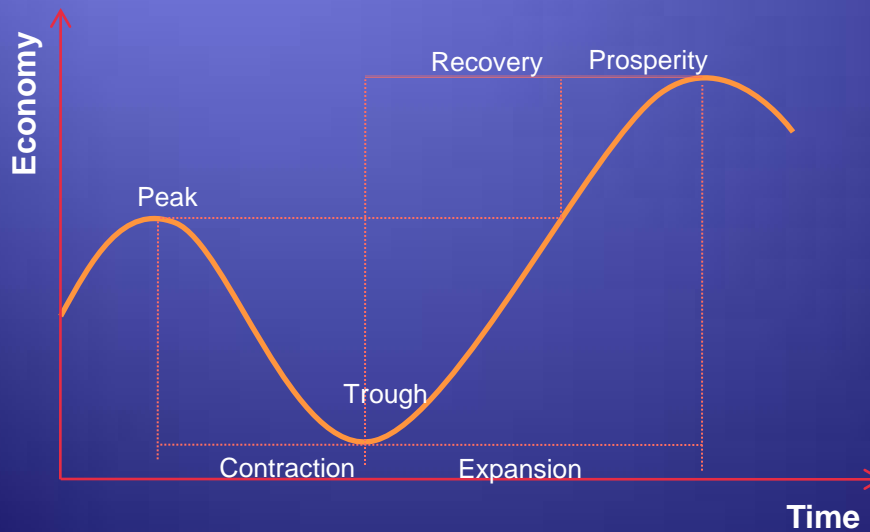
- ◆ Roy Spence – [It's Not What You Sell, It's What You Stand For](#)
- ◆ Rick Warren – [Purpose Driven Church](#)



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# Purpose

- ◆ Helping organizations to grow and excel
  - ◆ Business Process Optimization
  - ◆ Leadership and Strategic Planning



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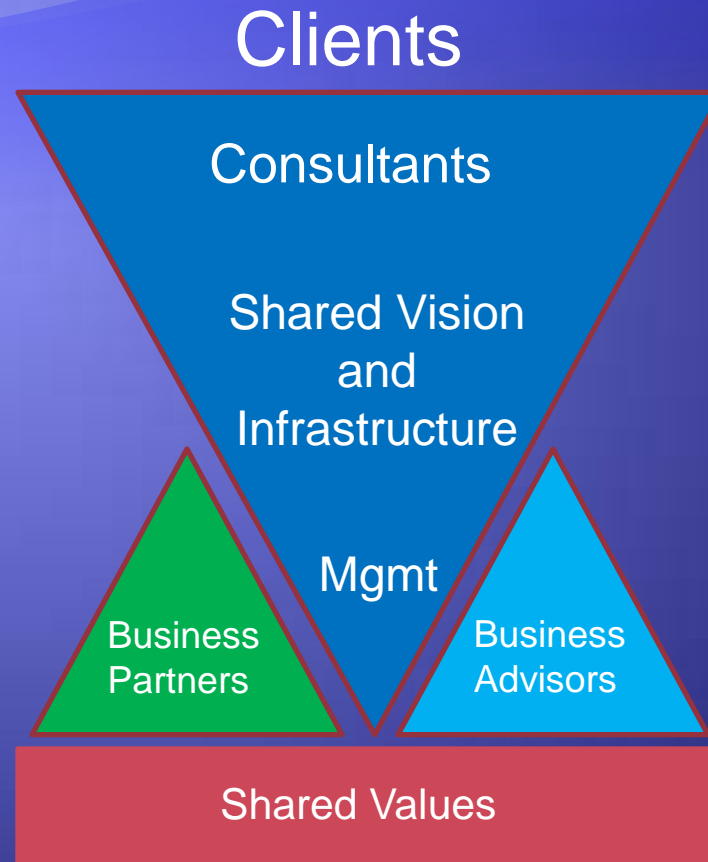
# Formation

- ◆ Passion for process improvement
- ◆ Started in April, 2009
- ◆ Founding Team members from AMD (ADVANCE)
- ◆ Common Perspectives:
  - ◆ Share vision for the future
  - ◆ Interest in consulting
  - ◆ Interest in building a business
  - ◆ High ethical standards & values



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# Organization



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# Team



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# Support (1)

- ◆ Business Advisors
  - ◆ Chad Chadwell – Extreme EDA (Sales)
  - ◆ Christine Lambden – Consulting Stance (Consulting )
  - ◆ Mark McDermott – UT & Intrinsity (Technology/Business)
  - ◆ Glyn Meeks – Software on Sailboats (Strategy)
  - ◆ Michael Ames – Wells Fargo (Finance/Strategy)



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# Support (2)

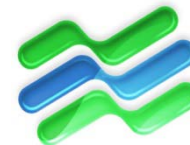
- ◆ Professional Resources
  - ◆ Eric Marquez - Tax/Legal Advice
  - ◆ Cuatro Groos - Health Insurance



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# Support (3)

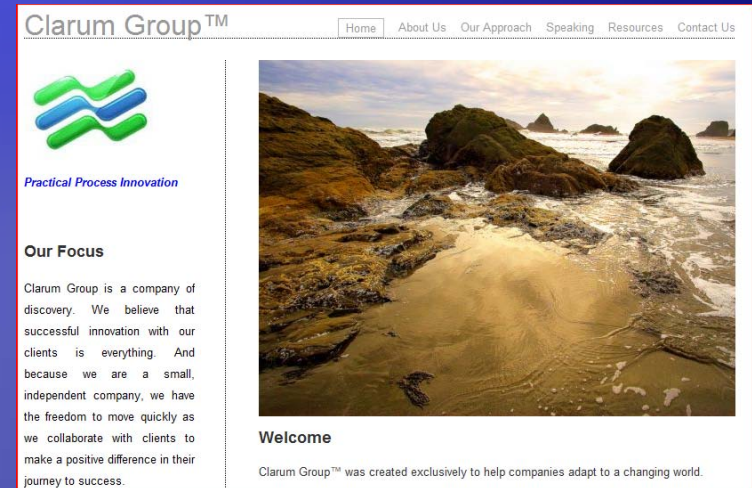
- ◆ Informal Advisors
  - ◆ Bob Davis – Sales Strategy
  - ◆ John Moore - Marketing /Branding
  - ◆ Brian Massey - Social Media Usage
  - ◆ Scott Peters - Management Consulting
  - ◆ Pete Monfre – Marketing/Messaging



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# Marketing

- ◆ Website :
  - ◆ [www.clarumgroup.com](http://www.clarumgroup.com)
- ◆ Networking
  - ◆ LinkedIn
  - ◆ NetworkInAustin – Scott Ingram
  - ◆ BridgeATX – Kim Brushaber
  - ◆ Bootstrap Austin
  - ◆ Metropolitan Breakfast Club
  - ◆ Austin Leadership Forum
  - ◆ Industry groups: IEEE, ASQ, SME, APICS, others



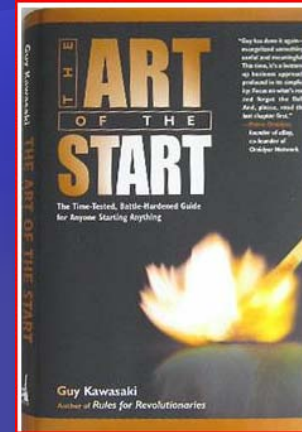
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# Learning (1)

## ◆ Books:

- ◆ Guy Kawasaki, Art of the Start
- ◆ Mahan Khalsa, Let's Get Real, or Let's Not Play
- ◆ Kerry Patterson, Crucial Conversations
- ◆ Allen Cohen, Influence Without Authority



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# Learning (2)

## ◆ Seminars:

- ◆ IEEE Consulting Workshop (2009)
- ◆ Consulting Stance
  - ◆ Succeeding in the Consulting Business
- ◆ Austin small business development program
  - ◆ Starting (Bizaid class)
  - ◆ Finance
  - ◆ Tax
  - ◆ Others



# Learning (3)

- ◆ Webinars
  - ◆ RallyDev – Agile, Change Management, Others
  - ◆ Others
- ◆ Local Groups
  - ◆ **Agile Austin** – Jack Yang
  - ◆ **Austin Software Process Improvement Network** – Joyce Statz
  - ◆ **Lean Software** – Scott Bellware
  - ◆ **Lean Startups** – Ash Maurya



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# Tools

## Tools for Entrepreneurs



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### Communication/Collaboration /Sharing Suites

37signals - Backpack, Campfire

Doodle

GetDropBox

Google.com/a

Google Docs

Google Wave

LineExchange

Mikogo

Synplicity

Skype

Zoho - Chat, Discussions, Meeting, and others

### Contact Management / Customer Relationship Management (CRM)

37signals - Highrise

FreeCRM

SoftwareonSailboats - Desktop Sales Office, Desktop Sales Manager, Desktop Contact Manager, Mobile Sales Office, Pocket Sales Manager

Zoho - Zoho CRM

### Document Creation

Microsoft Office - Word, Powerpoint, Excel, Access, others

Microsoft Works - (similar to the Office suite, but fewer features)

Open Office - (open source "mirror" versions of Microsoft, but may not be compatible)

Star Office - commercial version of Open Office

Zoho - ("mirror" versions of Microsoft, but may not be compatible)

### Event Invitations/Email Mast

Constant Contact - SpeakUp! and ListenUp!

EventBrite

Doodle

MailChimp

SurveyMonkey

### Project/Program Management

37signals - Basecamp

Microsoft - Office Project

Zoho - Zoho Projects

Ganttler

### References

Google - Local Business center

Yelp

### Sales Process

Salesforce.com

SoftwareonSailboats.com

Zoho - Zoho CRM

### Social Media / Online Communications

Facebook

Jigsaw

LinkedIn

Twitter

### Webcast/Webinar/Conference

BrightTalk

Camtasia

Cisco - Webex

Citrix - GoToMeeting

DimDim

Freeconference

Microsoft - LiveMeeting

ReadyTalk

SlideShare

YouTube

List provided by Clarum Group LLC, Austin, TX  
Visit us at [www.ClarumGroup.com](http://www.ClarumGroup.com)



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# Mikogo

The screenshot shows the Mikogo website homepage. At the top left is the Mikogo logo with the tagline "Free screen sharing for people and businesses". To the right are two buttons: "Join Session" and "Register Now". Below the logo is a navigation menu with links for "Download", "Product", "Support", "Blog", "Testimonials", "Company", and "Donate". The main content area is divided into two columns. The left column has a "Welcome to Mikogo!" section with a description of the tool and a "Register Now" button. The right column features a video player with the text "Last year Americans lost 4 billion hours in traffic". Below this is a three-step process diagram titled "Ready, Set, Mikogo!".

**Free screen sharing for people and businesses**

[Join Session](#) [Register Now](#)

[Download](#) [Product](#) [Support](#) [Blog](#) [Testimonials](#) [Company](#) [Donate](#)

### Welcome to Mikogo!

Mikogo is an easy-to-use cross-platform desktop sharing tool, ideal for web conferencing, online meetings or remote support.

And it's FREE for both commercial and private use.

[Register Now](#)

Last year Americans lost **4 billion hours** in traffic

### Ready, Set, Mikogo!

- 1 Call your participant**  

- 2 Start a session**  
Click the "M" icon in your system tray, select "Start Session" and receive the unique 9-digit session ID in the session info window.  

- 3 Have your participant join**  
Your participant visits the Mikogo homepage, clicks on "Join Session" and enters the session ID.  




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# Zoho

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Work. Online

Forums | Blogs | Pricing | Partners | FAQ | Support | Contact Us Toll Free : 888 900 9646  
888 204 3539

### Productivity & Collaboration Apps

- Zoho Mail** Web-based Email Service [Try Now](#)
- Zoho Writer** Online Word Processor [Try Now](#)
- Zoho Sheet** Spreadsheets. Online [Try Now](#)
- Zoho Show** Online Presentation Tool [Try Now](#)
- Zoho Docs** Online Document Management [Try Now](#)
- Zoho Notebook** Online Note Taker [Try Now](#)
- Zoho Wiki** Online Collaboration Wiki Site [Try Now](#)
- Zoho Share** Centralized Public Repository [Try Now](#)

### Business Apps

- Zoho CRM** 3 Users Free On-Demand CRM Solution [Try Now](#)
- Zoho Discussions** 2 Forums Free Customer Support Forums & Intranet [Try Now](#)
- Zoho Assist** **NEW** On-Demand Remote Support [Try Now](#)
- Zoho Creator** 2 Users Free Platform to Create Database Apps [Try Now](#)
- Zoho Invoice** 5 Invoices Free Online Invoicing. Quick and Easy [Try Now](#)
- Zoho Meeting** One on One Free Web Conferencing, Online Meeting [Try Now](#)
- Zoho Projects** 1 Project Free Project Management Software [Try Now](#)
- Zoho Reports** Online Reporting & BI Service [Try Now](#)

### Sign In

Username:   
Password:  [Forgot Password?](#)

Keep me signed in  
 Use Secure Access

New User? [Sign Up for Free!](#)

Sign In using

### Utilities

- Zoho Challenge 2.0** **NEW** Online tests made easy
- Site 24x7** Website Monitoring Service
- Zoho Polls** Online Polls in a snap



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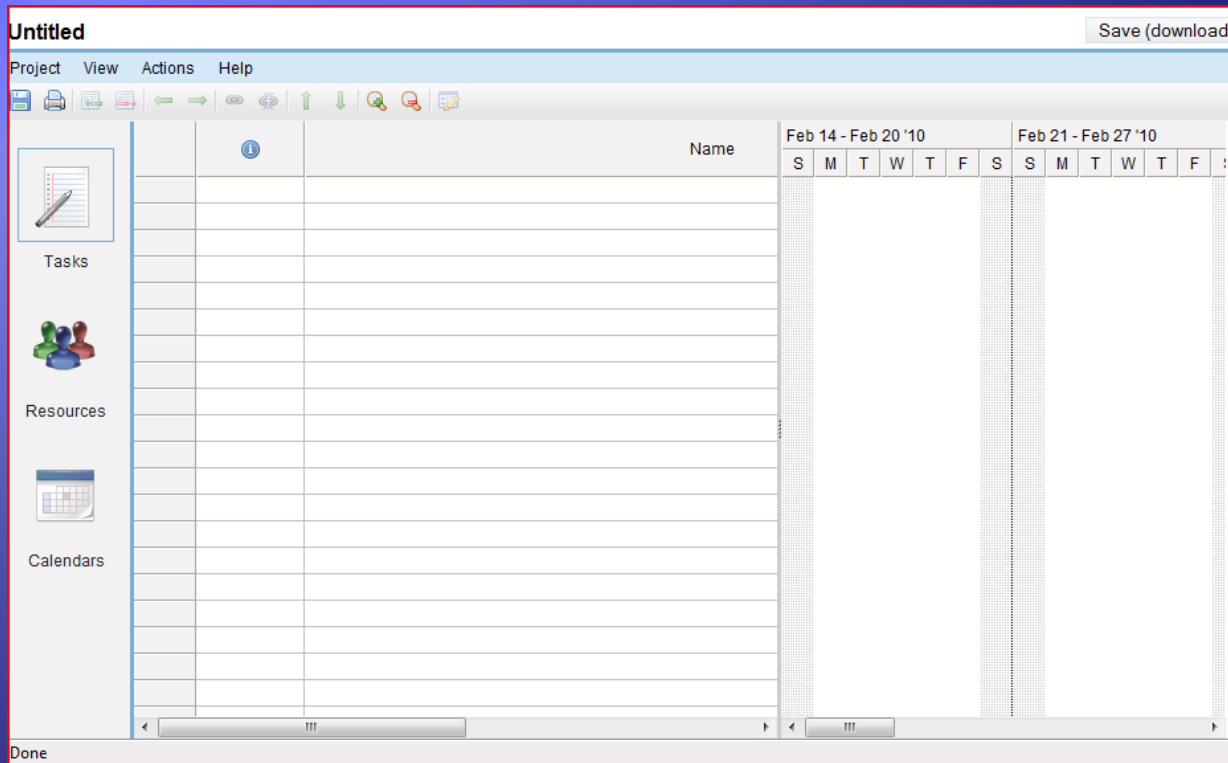
# Mail Chimp

The screenshot shows the MailChimp website homepage. At the top, the MailChimp logo is on the left, and 'LOGIN OR SIGN UP FREE' is on the right. Below the logo is a navigation menu with links for FEATURES, PRICING, CUSTOMERS, RESOURCES, SUPPORT, ABOUT US, and BLOG. A search bar is also present. The main banner features the text 'Get Social' and a cartoon monkey wearing a blue cap, holding a white bird. Below the banner, there are two buttons: 'SIGN UP FREE' and 'HOW IT WORKS'. The 'Completely Free Account' section lists 'Store up to 500 subscribers' and 'Send up to 3,000 emails a month', with a 'View All Pricing Options' link. The 'Top-Rated Social Media Tool' section includes a quote from Mashable: 'Featuring integrations with WordPress, Twitter, Salesforce and more, MailChimp is the list manager of choice for an impressive list of heavyweights including Mozilla, Intel, Canon, Fujitsu, Staples and more.' attributed to Barb Dybwad. The 'MailChimp 5.0 Adds Geolocation Tools' section mentions 'Our new location-based technology gives you the power to send email' and includes a globe icon.



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# Ganttter



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# Retrospective

- ◆ It's harder than you think ("*150% of time*")
- ◆ It will not go exactly as planned
  - ◆ Name change, Broken knee, Health Insurance, etc.
- ◆ It will take longer to:
  - ◆ build a network than expected
  - ◆ get clients than you think



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# Suggestions

- ◆ Best to have :
  - ◆ Access to smart business advisors
  - ◆ Smart people on your Team (vs. Solo)
  - ◆ Patience and persistence
  - ◆ An understanding and supportive family
  - ◆ Enough funding to bridge the gap
  - ◆ A solid business purpose !



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# Q&A



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