

GETTING STARTED IN INFOSEC CONSULTING THE MISSING CHAPTER



HOW TO START AND BUILD A
CONSULTING PRACTICE THAT YOU LOVE

T E D D E M O P O U L O S

Introduction

I missed one crucial thing in my book on getting started with consulting, something perhaps nonobvious.

I focused primarily on “how,” with a little “why” as well. I did this because most of the questions I’ve gotten and continue to get are on “how.” For example, “How to get clients,” and “How to set pricing.” I cover these extensively in my book; they are not “rocket science.”

Of course these are very important questions. For example, without clients you will not launch your consulting career successfully or maintain and perhaps grow your consulting practice.

Let’s back up a few years. I realized I had a massive blind spot. Most of the questions I had received over the past few decades weren’t in the area in which I consulted—information security, or cybersecurity if you prefer that term. Yes, I get lots of questions on topics like ransomware, security policy, the effects on possible future quantum computing on asymmetric encryption, artificial intelligence and much more. But those haven’t been the majority of questions.

I realized most of the questions centered around how to become a consultant. Things like, “You’ve been a consultant for a long time. How do I do that? How can I become a consultant?” Usually the focus was on “How?” Which is why I wrote *Getting Started in Infosec Consulting* and started giving talks on “How to become a consultant” and teaching classes on the topic.

Perhaps interestingly, about half the people who read the book, attend my webinars, talks, and classes are not in information security but other fields. Most of this information is universal. For example, getting clients and setting pricing is similar in all fields.

Well, I had another massive blind spot that I am now addressing.

The question of how to start consulting really is how to **successfully** start consulting.

Not merely financially successful. That's a given. If you are not financially successful you will need to stop and do something else to pay the bills: perhaps get a job, or play sax on the streets for donations, or pursue a life of crime.

When most people think of successfully starting consulting, they think of how to make enough money, sometimes more than they ever have made before. And money matters, of course.

But there is far more to success than money. There is contentment. There is happiness. There is excitement. And much more.

If you hate some aspects of your work, whether it's the people you work with, the work you do, or maybe where you do it, even if you make lots of money you are NOT successful!

So, the big question is "How do you start and build a consulting practice that you love?" and we address this here in this "Missing Chapter."

Starting as a consultant isn't hard. Many far less intelligent people than you have done it. That isn't to say that it isn't a considerable achievement, because it is!

You might be immediately financially successful as I was, with exciting and great-paying work already lined up when you start, or it might take two or three attempts, but are you happy? Have you built a consulting practice you like and enjoy?

Just like many people have seemingly very successful careers as employees, making piles of money, with plenty of accolades and respect, but absolutely hate what they do and therefore sometimes their lives, some seemingly successful consultants have built consulting practices they dislike. And of course, our work is a major part of our lives, and you are far more likely to have a happy life if your work brings you joy.

I'll go a step further. If a major part of your life is horrible, in this case your work, your life can't be great! If you are a consultant and dread much of your work, much of your life is going to be dreadful.

I've worked with several six- and seven-figure earners who simply hate their work and literally are counting the years or days until they can switch jobs or fire major clients or retire. Often, they feel trapped.

I feel sorry for them. Don't be like them.

The Basics

I strongly suggest you do the exercises in this book and write them down – don't just do them in your head. They don't take long. Also, it's recommended you write the exercises with pen or pencil and paper (or even chisel and stone tablet if you're old school). This engages a different part of the brain than simply typing them electronically.

You can download the accompanying workbook at <https://teddemop.com/missingchapterworkbook>

And do the exercises quickly – time box them, allowing maybe five to ten minutes per exercise. Remember each is a first pass and isn't intended to be perfect. Truly perfect doesn't exist in this universe, so don't let perfectionism get in the way.

We are going to look at our past work: the good, the mediocre, and the ugly. And we will think about what our ideal work would look like.

Then we are going reverse engineer everything! And make plans to make things better, even if they are currently fantastic.

Step I: Positive Aspects and Commonalities of Previous and Current Work

What follows below might seem overly positive, because it is. Nothing is perfect. We will deal with what can be improved, and in some cases may downright "suck" to use the vernacular, afterwards.

Look back at your work history. As an example, here is my work history or at least the high points. Focus on the good.

My first job after college qualified as close to perfect. I worked with great people who inspired me, many of whom are still close friends. I worked with exciting technologies and essentially was paid to learn. Once I proved myself, which took a mere two weeks, my boss gave me plenty of freedom and flexibility. I got to travel and visit new places all paid for by the company. The money was good.

When I started consulting a few years later, my income and freedom increased enormously. I was working with cutting-edge technologies, which I craved back then. Most of the people I worked with were fantastic and my international travel increased and I was very happy.

Today? Things have changed, as they should. I'm not as interested in working with the latest "bleeding edge" technologies unless my clients directly and strongly benefit from them. I'm rarely at the keyboard doing technical work for my clients.

More work is in the strategic planning and education space. I'm much more focused on improving my clients' condition than mucking with technology, which suits me extremely well now. Much of my work has little or nothing to do with technology or security today, and is more on the business side with consultancies and startups.

I work a lot of 80+ hour weeks and then have far more relaxing weeks in between where I work at whatever pace I like, which is great for me. I am traveling to exciting places both as part of my consulting and adjacent to business travel, which I love.

There are some commonalities in my three examples above.

I can quickly see from a simple analysis that I value freedom/flexibility, travel, and working with good people. What I specifically enjoyed working on evolved over time, and I'm sure will continue too.

Think about various phases of your career. If I was younger, I'd probably go back further to various summer jobs for example as a fry cook and as an intern for a judge. You may want to go further back.

What are the positive aspects? Pay particular attention to commonalities. Write them down.

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Step II: Mediocre to Ugly Aspects and Commonalities of Previous and Current Work

Next let's look at the mediocre and ugly aspects of our work.

In my first job, the most annoying thing was the lack of control in my schedule. Work from home didn't really exist then, although I managed to pull it off occasionally when I didn't need to be anywhere specifically, and that was great. And although I loved the travel involved, sometimes trips got cancelled pretty much last minute which affected activities around my trips and social life.

Although not mentioned previously, my first job evolved into working for Hewlett-Packard, as they acquired my employer. There were many positive aspects of

working for HP, and certainly many negative ones. High on the list of negatives was dealing with the massive bureaucracy, and interfacing with many people who were anything but creative thinkers. Longer term, having big company and massive bureaucracy experience has been valuable to me, although dealing with people that would only do things “The HP Way” still annoys me. “The HP Way” was code among many coworkers for “We will not consider changing anything we do even when things are obviously broken.”

Next, after HP, I became a consultant. As I look back at the last 30+ years as a consultant, including working with companies ranging from startups to Fortune 500 companies to government agencies, what have been the negative parts? Certainly, there are three big ones:

1) Relying on one or two big clients at various times. In [Getting Started in Infosec Consulting](#), I refer to these as “Mothership Clients.” These are clients you generally like working with, often a lot, who give you lots of work.

The positive is obvious: they tend to be good people, with interesting work, who give you lots of work, and pay well.

The negative? Because of all the positives, they often become a larger and larger percentage of your work and income. An obvious concern is that they might stop giving you work or a significant amount of work for whatever reason. Also, depending on one or two mothership clients can certainly constrain creativity as all the work is generally similar, and you are naturally ceding some control and hence there is some loss of freedom. They sometimes start treating you more as an employee instead of an independent consultant!

I struggle with this one, solving it periodically, and then falling into the same one or two big-client situation. Generally, when I fall into this situation, it is initially great, but not great in the long term.

2) The variability of income. Certainly, money has never been a primary focus of mine as I’ve been financially successful and I value other things more highly, but consulting does have a traditional “feast or famine” component. You have plenty of well-paying and interesting work, and you can’t imagine not being busy. Then you finish the work, realize you have little or no work in the queue and little or no

current income—and the thought of being busy and having lots of money flowing in seems like a distant memory.

This certainly cuts down on freedom because once you realize this, you are more likely to take almost any work that shows up.

I've mainly solved this issue through saving money when times are good, diversifying as much as enjoyable and practical, and **always** working on something to raise my visibility and hence stream of potential clients. I talk about this a lot in [*Getting Started in Infosec Consulting!*](#)

3) Clients not listening to my advice. Yes, clients often don't listen to your advice. For example, reports may be unread – it's common. And sometimes clients don't have the authority to implement your suggestions.

They may pay you well, they may value you and your advice, and nothing might be happening.

I've mainly solved this by working at higher levels at large organizations, for example the CISO and CEO level, working with smaller organizations including startups and one-person consultancies, and when working with large organizations—think government and Fortune 500—working on initiatives where I can make a positive difference.

There are some commonalities in my negative aspects I've mentioned above. A simple analysis shows I value freedom and flexibility and dislike the opposite. Creativity is important to me, and the opposite—working with fixed minded inflexible people—annoys me. Making a positive difference is very important to me. And yes, money matters.

Once again, think about various phases of your career. What are the mediocre to ugly aspects? Write them down.

Step III: Core Values

Let's forget consulting or any type of work for a moment and focus on the bigger picture.

Why? Work is a major part of your life, so asking “*What would be the perfect work?*” involves asking what is important in your life.

What’s most important to you? What matters most in your life (and hence work)?

Knowing what’s important to you helps in making great decisions in life.

Building a consulting practice you love involves making great decisions! No, they won’t all be great of course, but knowing what’s important to you helps guide your decision making.

We all know people who have made and continue to make bad decisions. I’m thinking of teenage Ted and a few of his decisions as an example, and we see examples all over the place.

It’s ok. Some of our past decisions haven’t been great—yes, I’m talking to you. And not all our future decisions will be either. We want more of our future decisions to be great or at least “pretty good” and that’s what this section is about.

We could use lots of different terms to describe what matters most to us.

I’m going to use the words “Core Values.” Knowing your Core Values helps you to make good decisions in your life, including in your career, so that you can be successful.

And what you consider success is very personal. It may be radically different from what I consider success.

I did a very valuable exercise on Core Values with a business coach a few years ago and we will go over it here.

Take five to ten minutes—and yes, having a time limit helps enormously here—and **QUICKLY** list the things important to you.

This is a first pass. You can refine them later. I prefer single words!!

Some of the things I wrote down were:

Family, Community, Creativity, Fun, Freedom, Experiences, Travel, Ocean, Health

Things others have also written down include:

Integrity, Humor, Respect, Optimism, Compassion, Possibility, Consistency, Faith, Connections, Collaboration, Persistence, and many more

Remember: There are no right or wrong answers and this is a FIRST PASS.

Distill your list to the most important to you.

Some may sound good but may not be the most important. I listed technology in my first pass, and that sounds great as I'm essentially a technologist, but I don't care as much about technology as the *positive effects of technology* so I removed it.

You may have some values that can be combined. For example, I wrote down both "family" and "community" and since "community" includes "family" I removed family from my list. Choosing "family" instead of "community" would have been fine as my family is the most important part of my community as well. There is no perfect answer so don't overthink this.

I also listed "travel" and "fun" initially and since I consider travel to be fun, I removed travel.

Try to get your list to three ideally. Four is ok, twenty-four is not! It should be a short list.

My list of Core Values (in no particular order) are community, freedom, creativity, and fun.

At first, I thought "fun" might be a bit superficial and flippant, almost silly, but I was overthinking things and my business coach said, "Ted, obviously 'fun' IS one of your Core Values."

The take away here? Don't overthink this!

Do you always act from your Core Values? Do you make decisions based on your Core Values? Do you even always remember your Core Values?

I'll admit I DO NOT!

But I try. I do my best. I hope to continue to improve.

All of my big successes (professional and personal) have been in synch with my Core Values.

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Your Core Values are your STRENGTHS.

As an aside, having your Core Values written down can be a great resource to use when you are struggling with a decision or the going gets tough.

Step IV: Your Ideal Work

We are now doing another exercise, temporarily ignoring the work we have already done.

First, describe your ideal work. Take three to five minutes to do this. Write down whatever pops in your mind. Of course, the exercises we've done above matter, but don't focus on them. Once again, don't aim for perfect. We will tweak it soon.

You can write a paragraph or two or just key phrases if you prefer. Whatever works for you.

If I was just writing down phrases, I might write something like: freedom, meaningful work, fun, exciting, travel, cool people.

Next, how does your current work (whether you have a "job," are self-employed perhaps as a consultant, some hybrid or something else), differ from what is ideal?

Again, take a mere few moments, and again you can write a paragraph or two or perhaps just key phrases.

If I were to write key phrases I might write: *bureaucracy, some mediocre travel, non-steady income, not making as much of a difference as I wish.* I literally took 90 seconds to do this.

So, what would be the perfect work for me now? What would be the perfect work for you? Yes, we are focusing on consulting but considering work in a vacuum right now.

Although I like to spend some time hands on with technology, I prefer most of my work to be in the strategic or advisory role. Making a positive contribution through meaningful work is more of a focus than in my early years. I love advising consultants and startups on the business side.

Lots of time off to pursue my own goals, whether professionally oriented or not, is required to make me happy. I don't mind working long and hard hours many weeks of the year to accomplish this. I want to work in exciting places when I'm not working from home. My income needs are high with kids in expensive schools and more.

Now let's take the results of Step I, "Positive Aspects and Commonalities of Previous and Current Work," and the results of Step II, "Mediocre to Ugly Aspects and Commonalities of Previous and Current Work," and compare them to what we've written.

There should be a lot of similarities and overlap. In other words, they should jive with each other. Make any tweaks you'd like. You may have missed something or over- or under-emphasized something.

Now compare to your Core Values. Your ideal work and your Core Values should be in agreement. Make any slight adjustments you deem fit.

Remember this is a work in progress. It will evolve over time and there is no perfect!

Step V: Non-negotiables

One last step to do.

We are going to talk about non-negotiables. Things that are not negotiable in your work and life.

There are both long-term and short-term non-negotiables.

Here are some examples of long-term non-negotiables.

- My friend Mandy will never work with tobacco companies or anyone that supports them.
- Paul's passion is in green energy. He only wants to work in green energy and adjacent fields.
- Luther is a homebody and happiest at home. He refuses to travel except for brief durations and wants to be home by 5:30PM most days.

- Penelope will absolutely not work on Elvis' birthday. Remember that non-negotiables are personal.
- Jack, while he is alive and able, will be at Opening Day, the first home game of the Boston Red Sox season.

Here are two of my long-term non-negotiables.

- I won't work on anything that doesn't make a positive difference, whether to my clients or the world.

It has to be fun or I don't want to do it. Meaning specifically, it has to have a major component I consider enjoyable. As Tom Peters said, "Do cool shit every day or die trying."

Here are examples of short-term non-negotiables.

- Eric was not willing to travel at all until he had a medical procedure done, and it took 18 months.
- Joyce was working on her master's degree part time and nothing work-related could interfere with its successful completion.

Here are two of my short-term non-negotiables.

- When my kids were younger, I severely limited summertime travel as my kids were home from school and I wanted to spend time with them.
- I won't take any longer-term projects that require me to be gone for extended periods of time, as my mother is in her 90s and I want to spend a lot of time with her while it's still possible.

Now make one final pass. Look at what you've written for your ideal work, and factor in any non-negotiables. Make any necessary tweaks and changes.

Voila, you've got it: an idea to work towards to help guide your decisions in building a successful consulting practice!

For me, I'll summarize as:

Making a positive contribution through my work is essential. Most of my ideal work is in the strategic or advisory role, although I want to get my hands dirty with technology some of time as well. I love advising both new and established

consultants and startups on the business side, as I know I make a very positive impact here, both to the individuals involved and their families.

I require lots of time off to pursue my own goals, whether professionally oriented or not. I don't mind working long and hard hours much of the time to accomplish this. I want to work in exciting places when I'm not working from home. And I insist that all my work has a significant "fun" component, although I realize that even the most enjoyable work may entail some drudgery and I'm ok with that!

The Final Words

Your statement of ideal work is a work in progress and is intended to morph and evolve over time.

Use it to guide you in creating a consulting career and life you love.

Realize we don't live in a perfect world and you may do some things in the short term that don't perfectly fit into "ideal."

Of course there are several reasons for this. It may be because you are just starting as a consultant and take on some work that may be "pretty good" or may be just "ok" to pay the bills. It may be for a myriad of other reasons. Here are two examples from my consulting career.

I mentioned that when my kids were younger, I absolutely severely limited summertime travel. One summer, a friend got very ill, and I ended up covering for him to help him out (as well as a mutual client) and I traveled more than I would have in an ideal world. I didn't have to, I chose to, and it was a good decision.

I also recently had a client convince me to help by traveling somewhere I absolutely did not want to go, to do some consulting work that I didn't love. I was happy to help them out as they were in a bind, and I added a "fun" three-day weekend somewhere I had never been and wanted to visit.

So, let's build a successful consulting practice that you love.

And if you're already consulting, let's make sure you keep loving it and it keeps getting better!

Of course, what you envision may not transpire; but what you don't expect might be even better. Now you have a guide to help steer decisions in a positive direction.

Hopefully you have downloaded the workbook at
<https://teddemop.com/missingchapterworkbook>.

Feel free to share this with anyone who might find it useful.