



**LOOK BEFORE YOU LEAP:  
SELF-EMPLOYMENT SURVIVAL STRATEGIES  
FINAL REPORT**

**Submitted by:**  
Life Strategies Ltd.

**Contact:**  
Dr. Roberta Neault, President  
Life Strategies Ltd.  
26907 – 26<sup>th</sup> Avenue  
Aldergrove, BC V4W 4A4

Tel: 604-856-2386  
Email: [roberta@lifestrategies.ca](mailto:roberta@lifestrategies.ca)  
Web: [www.lifestrategies.ca](http://www.lifestrategies.ca)



Developed with the support of the  
Canadian Education and Research Institute for Counselling (CERIC)

## Table of Contents

Introduction.....	3
Development.....	3
Literature Review.....	3
Survey Results.....	3
Course and Book.....	3
Website.....	3
Validation and Pilot.....	4
Project Pilot.....	4
Focus Group Results.....	5
Focus Shift and Revision.....	6
Marketing Activities.....	6
Project Success.....	7
Next Steps.....	7

## Introduction

The goal of the *Look Before You Leap* project was to help career practitioners better understand self-employment either for themselves or their clients. To this end, the *Look Before You Leap* project developed and piloted a 2 week (20 hour) facilitated e-learning course focussed on self-employment; wrote a book, *Look Before You Leap: Survival Strategies*; developed a dedicated “Look Before You Leap” website ([www.lookbeforeyouleap.ca](http://www.lookbeforeyouleap.ca)), with annotated links to relevant resources for the self-employed; and began a Blog available at <http://lookbeforeyouleap-selfemployment.blogspot.com/>. A facilitator’s guide to support career practitioners and counsellors interested in teaching the course, and a PowerPoint to support in-person delivery was also developed.

This project was structured in 6 phases

1. Project Start-Up
2. Project Research/Marketing, Website Development
3. Course Development / Write Book
4. Pilot Course
5. Develop Mixed-Mode / Facilitator’s Guide / PowerPoint / Book Edits
6. Deliver Course / Continued Marketing and Promotion

Phase 1, 2, and 3 constitute development activities, phase 4 validation and pilot, and phase 5 revision and development of support materials. Phase 6 represents our continuous investment in this project.

In the sections that follow, each of the phases and/or key project milestones will be presented.

## Development

A review of self-employment literature and survey of career practitioners was conducted in order to assist in the development of the Leap suite of resources.

### Literature Review

We reviewed academic articles and publically available websites/resources on self-employment, many of which now are posted on the Leap website ([www.lookbeforeyouleap.ca](http://www.lookbeforeyouleap.ca)). These resources provided insights into the reality of self-employment, how self-employment can be a viable option for the unemployed, and which factors lead to self-employment success. Several guides on how to get started were also reviewed, as well as what types of self-employment supports exist.

Through our review and supported by a confidential survey, we highlighted 35 characteristics of the successfully self-employed and used these to develop a 105-item checklist which clusters individuals into *low* with a few of the identified characteristics, *average* with some of the characteristics, and *high* with many of the characteristics.

### Survey Results

We surveyed both career practitioners and the self-employed and ended up with 90 individuals responding in whole, or in part, to the 10-question survey. Highlights include:

- Approximately 66% of respondents were currently self-employed, with the remaining 34% being self-employed previously
- The three most important characteristics of self-employed individuals were identified as
  - Self-discipline (25%)

- People skills (13.73%)
- Persistence (12.75%)
- Interestingly, while no one placed empathy in the top three, it was identified as an important characteristic within the qualitative section

The open-ended question results reflected very similar characteristics about personal abilities, with additional examples including creativity, curiosity, and resourcefulness. Relevant skills (e.g., networking, organization) and knowledge (e.g., ethical practice) were also deemed important.

Respondents also shared:

- Things they wish they'd known before becoming self-employed (e.g., how much time marketing your services takes)
- Helpful resources (e.g., <http://www.smallbusinessbc.ca/>)
- Self-employment lessons/stories (e.g., "There's no quick solution to becoming successful at self-employment. You just have to get out there and market yourself. Success takes years").

### Course and Book

Based on the survey results, and review of the literature, we identified 10 strategies for self-employment success, using these strategies to frame the development of the book and course.

The course was structured to run over 2-weeks (20-hours) and incorporates three assignments designed to improve the student's understanding of self-employment and develop the awareness/skills to support the self-employed.

### Website

The website, designed by John Philpott ([www.seescape.com](http://www.seescape.com)), was concurrently developed with the course and book and was broken into five sections, namely:

- About the Project
- Exploring Self-Employment
- Supporting the Self-Employed
- Resources
- News

We also set up a blog (<http://lookbeforeyouleap-selfemployment.blogspot.com/>) and Twitter account (<http://twitter.com/#!/lookb4leaping>) to support the website and provide a venue for marketing, resource sharing, and updates. The website, although fully populated, will continue to be updated.

### Validation and Pilot

To validate the Leap project we turned to career practitioners and the self-employed, conducting several small focus groups and also a formal pilot of the course.

### Project Pilot

The project was piloted in two groups – the first was offered March 2011 as a mixed-mode session in conjunction with a presentation on the project at the 2011 Career Development Conference (CDC); the other in April 2011 was fully online. There were 5 participants in the CDC session and 5 in the fully online session.

Although the first group consisted of career practitioners, the second was opened up to self-employed individuals and/or those considering self-employment, from a variety of sectors, giving us a diverse group. As so many of the topics seemed relevant to anyone interested in self-employment, we used this second pilot to determine whether, or not, the two groups could be mixed.

We conducted a brief survey of pilot group participants to collect their feedback on the course and also the book – 9 responded. The survey inquired about the length, pace, and format of the course, as well as asked for reflections on the usefulness of discussions, readings (including the book), and assignments. A summary of results follows:

- 55.6% of respondents indicated the course length was about right, 44.4% thought it was too short
- Similarly, 55.6% of respondents indicated the pace of the course was about right, with 11.1% indicating it was too slow and 33.3% too fast
- The most helpful topics were *Successful Self-Employment* (55.6%) and *Self-Employment Business Realities* (55.6%), whereas the least helpful was *Defining Self-Employment* (83.3%)
- As the online group integrated both career practitioners who may have been interested in self-employment for themselves and/or in gaining knowledge and skills to support clients, and individuals<sup>1</sup> exploring self-employment themselves, we asked if this mix of students worked. 44.4% said it worked well, with the remaining 55.6% saying it worked for some discussions and not others. No one indicated that it didn't work
- When asked about assignments, respondents found them helpful and practical but did indicate a need for a larger business plan template to assist with the third assignment. There was also some expression that the third assignment deadline could have been extended.
  - It's worth noting here that we do offer a course extension option for our online courses, and special arrangements for deadline extensions can be negotiated upon request
- 88.8% of respondents found the Leap book either very useful (44.4%) or useful (44.4%) but did highlight some minor adjustments to worksheets. One respondent stated: "The work book is something I could go through with a client. I would use activities along the way to help them further explore their options (check list, tips, homework tasks)"
- Respondents also noted some more resources within the course (e.g., templates) would be helpful additions

Overall participants reported that they enjoyed the course, even mentioning they'd recommend it to others; however, some did note they were expecting more "teaching" versus "facilitating." Course participants were also invited to participate in the focus group regarding the overall project.

### Focus Group Results

We conducted three focus groups in April 2011, two were face-to-face and the other was via the GoToMeeting web conferencing system. Participants included both the self-employed and career practitioners, some with self-employment experience themselves. All together 13 people participated; they were each provided with a complimentary PDF copy of the Leap book (with the commitment to send them a printed copy of the book once it was published).

Two mind-mapping activities (i.e., What resources would you want to see included on the website? What blog topics would you find most helpful?) and seven questions (e.g., self-employment status, route into self-

---

<sup>1</sup> For the pilot we had 1 electrician and 1 cabinet maker

employment, characteristics/roles of the self-employed, and Leap project components) structured the focus group. However, participants were also encouraged to share any additional thoughts on self-employment.

Highlights include:

- Variety of ideas for website resources/content
  - e.g., support systems, bookkeeping/financial information, networking opportunities/events, “live advisor,” online library
  - Confirmation that information should be easily accessible and in plain English
- Variety of blog topic ideas
  - e.g., setting priorities, labour market trends, using social media, technology tips
  - Seen as a good place to share self-employment success stories
  - Preference for blogs that engage discussion
- Expression of the loneliness of self-employment
- Reports of “falling into” self-employment as a career rather than directly pursuing it
- Recognition that closing a business isn’t necessarily a failure; could be necessary at that time
- Acknowledgement that the self-employed must be self-disciplined to get things done

### Focus Shift and Revision

As we developed the materials and worked through course with pilot participants it became evident that the Leap suite of resources could be useful not only to career practitioners supporting self-employed persons or seeking to be self-employed, but also to individuals from a wide variety of industries and sectors who were self-employed or considering self-employment. As noted previously, several self-employed persons took part in the pilot of the course and participants confirmed that this mix of students worked.

After all feedback from the focus group and pilot sessions of the course was collected and reviewed, both the course and the book were adjusted.

- We included a more in-depth business plan template upon request
- Several sections of the book were expanded

After the book and course revisions were finalized we moved on to the development of the supporting materials for facilitators (i.e., the facilitator’s guide and PowerPoint).

### Marketing Activities

To date, marketing activities have included:

- Features on our website ( [www.lifestrategies.ca](http://www.lifestrategies.ca) ), and in monthly newsletter, blog, and Twitter accounts.
- Presentations on topic at:
  - BCCDA’s Career Development Conference (CDC) 2011
  - CANNEXUS 2012 (anticipated)
- Exhibits during CDC (2011) and the Surrey Business Tradeshow (2011)
- Messages to our Welcome Wagon<sup>2</sup> contacts
- Blog
  - 13 posts, 3 followers

---

<sup>2</sup> Welcome Wagon reaches out to new local business with information on products/services within the area essential for business success. See <http://www.welcomewagon.ca/en/business/executive.php> for more information.

- 2 guest contributors
  - Susan T Spencer (<http://www.briefcaseessentials.com/>)
  - Doug Barra (co-owner of ActionCOACH Team Sage)
- 948 pageviews total (53 in June 2011, 342 in May 2011, 72 in April 2011, 82 in March 2011, 43 in February 2011, 315 in January 2011, 6 in December 2010)
- Traffic sources – mainly from the Leap website and Twitter
- Most pageviews from Canada (668), then US (179), and then Germany (29)
- Twitter – 44 tweets; 25 followers (also featured on Life Strategies Twitter); 5 mentions

## Project Success

Overall, the project has met all of its objectives. The course materials and book have been very well received and there has been growing interest in the topic. Revenue, to date, has been low but that was anticipated as pilot program participants were charged a nominal fee (e.g., \$100 per person, which included the Leap book, rather than requiring participants to purchase the book separately). In June 2011, we launched the final iteration of the course with 2 students at full price (\$329.00 each) and have since sold 5 *Look Before You Leap* books.

## Next Steps

Through the project activities it became clear that the Leap materials (e.g., course, book) can benefit a wider audience than originally anticipated. Connecting with this larger target market, while also reaching out to the career development community, will be the focus of the next few weeks and months. We plan on making effective use of social media (e.g., Twitter, Facebook, LinkedIn, MeetUp) to target specific groups, including:

- Career practitioners, career/employment counsellors
- Stay-at-home moms, “mompreneurs”
- Tradespeople (e.g., electricians, carpet layers)
- Multi-level marketing companies (e.g., Avon, Pampered Chef, Stella & Dot Jewellery)
- Self-employment and small business associations (e.g., Small Business Association of Canada, SOHO)
- Self-employment programs
- Welcome Wagon

Beginning in September 2011, the Leap blog will feature a 10 part series drawn from the 10 strategies listed in the Leap book. We also expect to have 1-3 additional blog contributors and the next course is scheduled to begin September 21, 2011.

The Life Strategies team would like to thank the CERIC board for selecting this project for funding support and Riz Ibrahim for his guidance at all stages of the process.