So You Want to Be an Information Security Consultant



Lessons from the Trenches

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From Corporate CISO to Independent vCISO



2017

Left stable corporate role with no job lined up

Calling

Answered a clear calling to serve SMBs

Growth

Built vCISO Services from zero into a thriving practice

Today

9 years later — best career decision I ever made

What We'll Cover Today

01  Start with Your "Why"

02  Freedom Comes with Responsibility

03  Mindset, Risk & Discipline

04  Scope, Skills & Pitfalls

05  Getting Clients Authentically

06  The Business & Life Side

07  Your Next Steps



Lesson 1

01

Start with Your "Why" (and Return to It)

- Most technical people fail here
- Common motivations vs. sustainable ones
- Independence | Money | Passion | Bridge job
- Your reason must survive hard months

Tool: The Five Whys Technique

1	**Why consult?**	→	More flexibility
2	**Why flexibility?**	→	Spend more time with family
3	**Why family time?**	→	Kids are growing up fast
4	**Why does that matter?**	→	I don't want to miss it
✓	**Root cause:**	→	Family is my core value

Exercise: Try it for 60 seconds

My Personal "Why"



- Serve underserved SMBs with real security programs — not just compliance
- Shaped client selection, culture, and standards
- Your "why" = compass during tough times

Key Takeaway: Write it down. Revisit often.



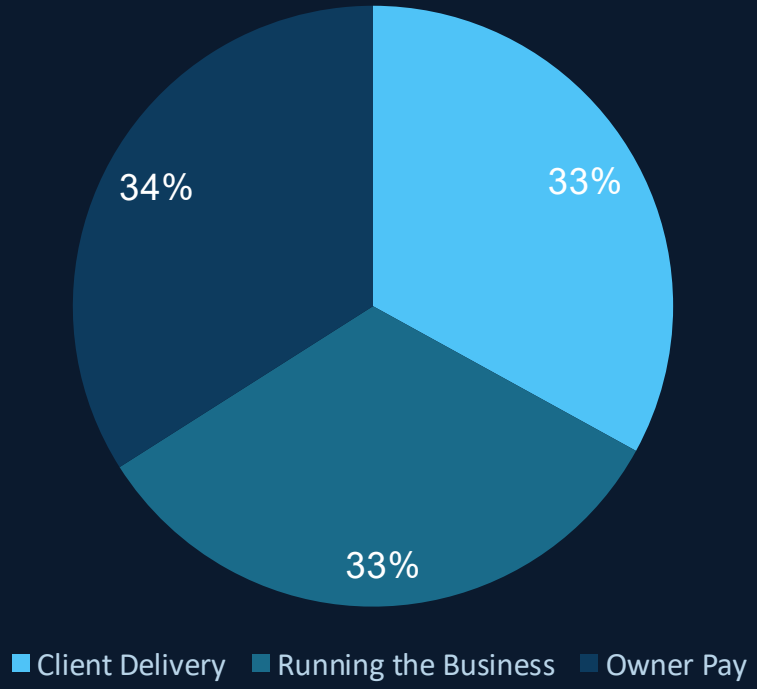
Lesson 2

02

Freedom Comes with Massive Responsibility

- You are now the entire company
- Sales, delivery, marketing, accounting, HR
- "What's a business plan?" — my real first conversation
- Nobody is coming to save you

The Thirds Rule



≈ 1/3 Client Delivery
The work you're actually hired to do

≈ 1/3 Running the Business
Admin, marketing, ops, networking

≈ 1/3 Owner Pay
What you actually take home

Reality Check: Early months = more time on business ops than client work

Protect Your Most Valuable Asset — Time



Block Calendar Ruthlessly

Dedicate specific blocks for client work, marketing, and admin tasks



Strategic "No" Blocks

Say "no" to most 15-30 min "quick chats" that derail your day



Essential Tools

QuickBooks, calendar aggregator, Jira — automate what you can

Lesson 3

03

Mindset, Risk Tolerance & Discipline

- Financial risk assessment before resigning
- Professional risk (liability, reputation)
- You must create your own security
- No safety net — you ARE the safety net

Managing Financial Risk



- 9-month emergency fund (my choice)
- Start part-time if possible
- Diversify clients — never depend on one
- Clear payment terms + late fees
- Separate business & personal finances

The Discipline Trap

Before

- Thought working from home would be heaven
- 6 months later: stir-crazy and unproductive



After

- Joined a coworking facility
- Massive productivity boost
- Built professional community

Lesson: Know yourself. Design your structure.

Lesson 4

04

Define Your Scope & Master Real Skills

- Niche > Generalist (easier marketing + higher value)
- Technical skills get you in the door
- Non-technical skills keep you there
- Be known for something specific

Must-Have Consultant Skills



Clear Communication

Translate complex security concepts for non-technical people



Empathy & Business Understanding

See security through your client's business lens



Solution Delivery

Deliver solutions — not just findings and reports



Ruthless Time Management

Your time is your inventory — manage it like revenue

Biggest early mistake: Thinking tech skills were enough

Avoid These Pitfalls



Difficult Clients

Have clear processes, contracts, and the courage to fire bad clients



Scope Creep

Define deliverables precisely. "Just one more thing" destroys margins



Burnout

Set boundaries. You can't pour from an empty cup



Unclear Expectations

Document everything. If it's not written, it didn't happen



Lesson 5

05

Getting Clients Without Selling Your Soul

- LinkedIn — give value first, always
- Speaking & conferences build credibility
- Referrals are your best channel
- High-quality proposals close deals

"Why Should I Care?"

Real Mentoring Story

A new vCISO wanted to post about NIST CSF 2.0

Problem: Generic content nobody cares about

Shifted focus to real SMB experience

Result: Instantly more valuable and engaging



Sell your real experience, not generic content.



Lesson 6

06

The Stuff Most People Ignore

- LLC formation & structure
- Professional insurance
- Contracts & legal review
- Separate business accounts
- Taxes & record keeping
- Work-life balance is intentional
- LinkedIn etiquette matters
- Join ISSA, ISACA, attend conferences

Start Thinking About Your Exit Early



Sell the Business

Build value and find a strategic buyer



Merge / Partners

Join forces to scale together



Gradual Drawdown

Slowly reduce your client load over time



Delay & Continue

Keep going if you love the work

I went through the sale process twice — learned a lot both times

Key Takeaways

1. Know your "Why"
2. Freedom = Responsibility
3. Build resilience & discipline
4. Define scope + non-technical skills
5. Market authentically
6. Plan the business & life side

One Regret



Create a simple written business plan much earlier.

Even a one-page version helped me tremendously later.

Resources & Next Steps



Book

So You Want to Be an Information Security Consultant (coming soon)



YouTube

Expanded presentation with deeper dives on each lesson https://youtube.com/@vciso



Incubator

vCISO Services Guidance / Incubator support program (in development)



Connect

LinkedIn: https://www.linkedin.com/in/gregoryschaffer/

Add your QR codes and book cover image to this slide



Thank You!

Questions?

Let's talk about your "why" or your biggest concern about going independent.

Greg Schaffer | Contact Info | LinkedIn

Quick Reference Handout



Your "Why" Template

- Define your core motivation
- Test it with the Five Whys
- Write it down, revisit quarterly



The Thirds Rule

- 1/3 Client Delivery
- 1/3 Running the Business
- 1/3 Owner Pay



Five Whys Worksheet

- Ask Why 5 times
- Dig past surface answers
- Find your root motivation



Top Pitfalls Checklist

- Difficult clients → processes
- Scope creep → contracts
- Burnout → boundaries