# DO MANAGEMENT CONSULTANTS UNDERSTAND THE PSYCHE OF THEIR CLIENTS?

**Track: Managerial Consulting**

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## ABSTRACT

This paper reveals the lack of discovery of the unwritten or unspoken expectations of clients in consultant-client relationship. Successful management of these expectations on the part of the consultant could lead to fruitful outcomes for both clients and consultants alike. In addition, consultants who are adept at managing these expectations could gain a competitive advantage in a highly competitive profession. This paper reviews both academic and practitioner literature in relation to factors that are seen as impacting significantly on consulting assignment outcomes for both client and consultant and highlights the dearth of research surrounding the investigation of the interplay, connectedness and relationship between the various factors identified in isolation in the existing literature. In addressing this gap, a conceptual framework is proposed with a broad research agenda with research questions to establish the linkages between the significant success factors identified in the literature. This paper makes a unique contribution towards future research in this respect through the provision of a clear conceptual framework and robust research agenda.



Keywords: client expectations, professional contribution, personal style, outsourced consultants, management consulting.

## INTRODUCTION

The underlying proposition that drives this conceptual paper is that management consultants who meet the implicit of their clients are more likely to secure further engagements and referrals than those who merely meet the technical requirements of consulting assignments. The implicit expectations are those that are not explicitly written into a contract or verbally expressed by the client before the start of consulting assignment.

Client expectations have been categorised into three levels for the purpose of this paper: technical competence, professional contribution and personal style. The aim of this paper is to review the unspoken expectations of clients assuming that technical competence is a pre-requisite and does not provide the differentiating factors that will ensure engagement with the client. While these expectations will vary depending on the individual traits and beliefs of each client, this study will cover many important areas for consideration.

Many management consultants are now performing outsourced IT, administrative, commercial, financial or other activities for and on behalf of their clients (Kubr, 2002). The work place seems to have changed significantly over the past two decades, as more and more jobs have switched from a ‘traditional’ to a more ‘contingent’ category (Parks et. al., 1998:698). Contingent workers are diverse in nature and its coverage includes consultants, independent contractors, temporary workers, part-time workers, seasonal workers, volunteers, sub-contracted workers, and leased workers (Polivka and Nardone, 1989). This paper focuses self-employed consultants only and therefore it does not cover consultants who work as employees for consulting firms. The reason for excluding consultants employed by consulting firms is that these categories of consultants are not included in the definition of contingent workers. In general, contingent workers such as self-employed consultants do not have either an explicit or an implicit expectation that employment will be continuous or ongoing even assuming that there was satisfactory performance by the consultant (Zeytinoglu and Norris, 1995); consultants employed by consulting firms will normally be reassigned to other client projects on completion of an assigned client project. At this point, it is appropriate to ask whether client organizations require consultants as contingent workers to deliver on psychological contracts that are similar to those expected of employees. Martin, Horne and Chan (2001) affirm that there are unspoken expectations in the client-consultant relationship and define these as the unwritten and unofficial contracts that focus on different expectations of clients and consultants. However, their work does not identify the specific unwritten expectations rather it concentrates on meeting general perceived gaps in expectations of both client and consultants. Recently researchers (e.g. Chelliah and Davis, 2007), have commenced exploring psychological contracts in consulting relationships borrowing its application in human resource management in the case of employees. Chelliah and Davis believe that outsourced consultants do have an expectation of securing on-going assignments from clients and in this respect, they have similarities to employees (who expect on-going employment).

This paper attempts to identify clients' unspoken expectations in relation to consulting assignments through a literature review. A conceptual framework is also put forth to clarify the relevant constructs together with a set of propositions which could guide field research in this specific area.

## LITERATURE REVIEW

Clark and Salaman (1996:155) define management consulting as an "advisory activity which necessitates intervention in an ongoing system where the advisers are external specialists and so have no organizational responsibility, and where the aim of the activity is some alignment to the organizational system."

The definition implies that consultants have the technical expertise necessary as a prerequisite as a starting point in the client-consultant relationship. Often there is a perception that technical skills of a consultant are the most important factor in determining consultant selection by clients (Czerniawska, 2002:8). This perception is reinforced by leading management consulting firms through their recruitment method because they rely on the case-study interview as a tool for selecting consultants (Armbruster and Schmolze, 1999 cited in Armbruster, 2004: 1250). This is based on a job interview in which an abbreviated form of a Harvard Business School case study is posed to candidates.

Is technical competency of the consultant the most important factor in securing new business and referrals from existing clients? Berholz (1999) espouses that sound technical performance is easily undercut by failure to meet expectations in two key areas which can be classified as professional contribution and personal style. He defines professional contribution as an expectation that is layered on top of technical competence. This is based on client's unspoken expectation that the consultant will contribute some extras such as carry out engaging executive's personal agenda, give supplementary advice without extra charge and transferring some competencies to client's staff.

Personal style is also a set of unspoken client expectations, defined by Berholz (1999) as relating to the consultant's ability to fit in appropriately by reading the environment of the client, being enjoyable to spend time with and when required to listen and empathize with the client while providing some counsel without charging additional fees. In a similar vein, Appelbaum (2004) through his literature review lists a number of that influence client-consultant relationship which apart from technical competence include an adaptation to client readiness, an investment up front in learning the clients environment and a real partnership with consultants.

## Professional Contribution

The career health of the client needs to be maintained throughout the consultation process. In order to achieve this, the consultant must manage perceptions to protect the interests of the client. 'Agenda pushers' can be damaging to themselves as consultants, as well as the client. Clients do not want to hear how they could not have done it without the help of the consultant. Sheth and Sobe (2000) reinforce this notion stating that there are consultants who are focused on what they want and need rather than on the client's agenda. They further promote the stance that when walking into a meeting there must be a focus on the client's needs, and how this will eventually achieve their own personal objectives. The client will be motivated by success and self-elevation within the workplace (Romaniuk and Snart, 2000). The consultant must realise that the client expects a high level of personal gain from their relationship. Judge, Erez and Bono (1998) state that self-efficacy can lead to a self-fulfilling prophecy of greater success in new endeavours. The consultant's should be aware of the client's self-efficacy that includes client's judgements of their capabilities to handle events and deal successfully with challenges. Therefore, the successful consultant must allocate the correct level of resources necessary to attain the client's personal goal as well as those related to the project itself.

When Bergholz (1999) believes that clients expect to be coached sensitively without losing their status as an employer or having their authority challenged. To facilitate this need, the consultant must apply assertive persuasion. Kubr (2002) explains that this method uses the forces of logical argument to convince other people that what you want them to do is the correct or most effective action to take Hoar (2005) infers that persuasion is a vital skill: more subtle than the art of negotiation, less detectable than delegation and close to Machiavellian manipulation. Conversely, Czerniawska (2005) says that clients want leadership from consultants and clients want consultants to stand up and be accountable for the results of their ideas. In order to be coached effectively, there needs to be open communication and no restriction of information, which is seen as 'ugly' by the client.

Goh (2002) gives the example of a scenario where mistakes or failures are documented but not made known to others, and then knowledge of them is not used to learn how to avoid these mistakes in future. A high level of trust is needed to be able to collect all the pieces that will eventually affect the quality of the project. In May's (2004) opinion, one cannot design trust nor demand it from others anymore than one can declare themselves trustworthy. May adds that three elements need to be present in building trust which take the form of the consultant should displaying consistency, competence and caring.

Bergholz (1999:30) refers to the consultant as a 'hired gun' with a mission to eliminate people within the client's hit list. This should be approached with caution with the need for balanced judgements. Sheth and Sobe (2000) advise consultants to be wary of being used by to confirm premeditated solutions of the clients. There may be underlying factors affecting the performance of the individual, and blindly accepting orders will not enhance your integrity and professional reputation. They recommend that consultants try to identify thinkers who can challenge the clients thinking. These may include other levels of management within the client's firm that have a clearer view of prevalent issues or are removed enough for greater clarity. Dreyfact (1970:8) believes that "yes me" contribute little to growth and more importantly, they encourage "good-enoughism" and complacency. Consultants should be encouraged to speak honestly, without feeling vulnerable, and believe that there will be rewards for speaking openly. Clients do not generally look outside the organisation for people to agree with them but rather search for new ideas and perspectives and someone who will inspire and stimulate discussion. Furedi (2005) puts forward the argument that many managers who are afraid to make decisions hire high priced consultants to reaffirm the obvious and indicates that it is generally safer to adopt someone else's best practice than to engineer your own.

The consultant must be able to work effectively within different cultural spheres and act accordingly. Bohm (2003) insists that the fact that consultants enter organisations ostensibly to solve problems does not mean they are immune from the insecurities and apprehensions that afflict managers in client organisations. As well as cultural factors, the type of industry can be highly influential in the type of information and input required from the consultant. Further, Bohm is of the opinion that highly regulated industries may require the consultant to reinforce the client's ideas rather than show entrepreneurial flair. To produce a report for a local authority in order to gain approval may require clever wording and a procedural approach rather than left field ideas or artistic ability. The public sector, which is subject to high levels of scrutiny, is becoming more reliant on consultants according to Bohm.

Goh(2002) believes that although creating knowledge is an important activity, that knowledge has to be harnessed and leveraged in order to be useful. Bergholz (1999) states that imparting this created knowledge will result in competency-transfer. Dawson (2000), however, argues that knowledge sharing does not necessarily result in competency transfer. When knowledge is transferred it changes, as knowledge is intrinsic, to people and one person's knowledge will always differ from another person.

Goh (2002) reveals that research has begun to examine knowledge transfer in terms of the characteristics of the knowledge recipient, the characteristics of the knowledge source and the context in which the transfer occurs. Further, Goh (2004) points out that company culture can be an enabler or a barrier to knowledge transfer. He believes that unless groups and employees have a natural tendency to share and collaborate with each other effective transfer will not occur. There can be a tendency to fear outside advice and inner circles of employee can obstruct the flow and acceptance of ideas. Menon and Pfeffer (2003) point out that managers in organisation often cohere in closely knit in-groups and come to see that knowledge what insiders posses as superior to knowledge that lies outside the walls of their institution.

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Menon and Pfeffer (2003) highlight the fact that managers in organisation often cohere in closely knit in-groups and come to see that knowledge what insiders posses as superior to knowledge that lies outside the walls of their institution. On the other hand, information transfer should be open and without reserve on behalf of the consultant to build the internal knowledge base and confidence of the client and their employees. The client believes that these services were paid for and the experience gained should be able to be used independently. Kubr (2002) defines knowledge sharing as an attitude and a skill, and many consultants require guidance and encouragement to be more effective at it. Bergholz (1999) indicates that the consultant must accept that as the teams become stronger and more cohesive, they will gain expert power and diminish the requirement for assistance, whilst at the same time create their own vulnerability. Consultants should not fear that by doing an exceptional job they have given away their most productive asset being their knowledge. Dawson(2000) states that knowledge transfer is often not about teaching your clients to do what you do, but making them better at what they do. Dong-Gil (2005) says that client firms expect consultants to transfer their implementation knowledge to their employees so that they can contribute to successful implementations and learn to maintain the systems independent of the consultant.

Good organisational citizenship behaviour(OCB) can be displayed by doing that' little bit extra' that is not expected by the client or intangible deeds such as co-operating with others or active thinking. Consultants have the discretion to portray these attributes if they feel inclined to or believe that it will benefit them within the organisation. Bolino and Turnley (2003:2) propound that organisational citizenship behaviour has two common features: they are not directly enforceable and they are representative of special or extra efforts that organisations need in order to be successful.

Cohen and Vigoda (2000) argue that this is not necessarily a choice, but rather OCB is related to general citizenship. They believe that people who tend to perform more good citizen behaviour in the communal or national sphere are also more likely to do so in the workplace. On the surface it is fair to expect that management would look favourably on good OCB as these attributes would lend to an improved working environment, however is this really the case? A recent study by Turnipseed and Russuli (2005) reveals that not all facets of OCB culminate in better performance. The research was divided into social, advocacy and functional categories that showed varying results when correlate against performance. For example, the fact that someone is helpful and obliging within the organisation may result in a decline in the performance in the individual that is providing the assistance. The Turnipseed and Russuli (2005:241) study indicates that managers perceive differences in OCB between the 'best' and 'worst' performers, however they rated employees lower than employees rated their peers. It also found that employers perceive a stronger OCB-performance link than do employees.

Hui, Jam and Schaubroeck‘s (2001) study on service levels in the banking industry found that good citizenship was the theoretical factor causally responsible for improvement in service quality when selecting service leaders with good OCB. This would indicate that OCB is recognised and accepted at a lesser managerial level and that that the consultant could work successfully at this level displaying these attributes

**Personal Style**

Previously, when discussing professional contribution, it was assumed that technical competency was a pre-requisite, and that this is the minimum entry level. In much the same way, when personal style is the defining factor, it reflects that the candidates are equally rated with regard to technical competency and professional contribution. Bergholz(1999:32). feels that the client hygiene factors are satisfied at this level of competency. He believes that satisfying the technical competency and professional contribution needs, elevates you to a powerful position amongst competitors, and only then will personal style be the point of difference, elevating a particular consultant above the competition. Armbruster (2004:1259) makes the assumption that intellect is generally the equivalent to mathematical-logical skills and that the rest is ‘the other’, the ‘non-intellectual’, the ‘soft’, the ’emotional’ and ‘immeasurable’.

Hirschhorn and Barrett (1993) describe personality as self-systems which are motivating forces concentrating on the maintenance of interpersonal security and the avoidance of anxiety. They state that self-systems are learned defensive activities against anxiety caused by the loss of security or self-esteem. This brings into play a new motivator behind personality types that may not seem evident, but should be a consideration during personal interaction. These anxieties are heightened during high pressure situations and may be reflected in the personality of the client differently depending on the levels of stress encountered (Hirschhorn and Barrett, 1993:221).

May (2004) demonstrates his failure to identify personal style in saying that certain situations demand one element over the other, which holds the potential to erode trust. This is where personal style factors can shore up the relationship. Bohm (2003) states that outcomes reflect the social characteristics of the people involved, producing a value relationship between the client and consultant. However, May(2004) disagrees and believes that the consultant neither needs to be liked or agreed with, but only to be trusted to break into the inner circle. A recent study by Doosja (2004) emphasises a quite counterproductive point about social interaction, namely that in intergroup situations certain forms of liking may seem irrelevant or even antagonising, depending on the source.

Maru (1999) believes that 'liking' between people is a complex dynamic. However, some of those dynamics can be uncovered and purposefully developed and skills such as listening, trust creation and conversation building with philosophical agreement should be employed. There needs to be an awareness of subtleties in behaviour and an ability to react appropriately. Kolb (1984) advocate that cues are often direct: through words, gestures and facial expressions they are transmitted to the perceiver (interpreter) directly to the perceived communicator. Some cues are more clear-cut than others are and can be gained through external sources as well trained or in built perceptions. Kihn (2005:17) believes that consultants are not hired as experts, but they can never appear to be anything less than expert like. The critical part of that word is 'like'. He goes on to say that it is an act, a charade, a delightful pas de deux. However, it is essential. It is therefore fair to expect that both the client and consultant will be role playing to some extent and utilising certain techniques in order to be gain acceptance and 'be liked'.

Consultants are expected to bring a broad view of the business environment to an organisation and share this outside the boundaries of the assignment according to Bergholz (1999). Joni (2005:16) insists that it is of vital importance to have well-placed and well-prepared outsiders in a leaders inner circle and calls them 'third opinion advisors'. He believes that most consultants act as 'second opinion advisers' and offer opinions based on their expertise and experience in their known field. This may be all that is required if chasing black box projects or if this is a preferred safety zone of operation. However, in order to break into the inner sanctum, a higher level of respect and trust is imperative. Joni (2005:1) advises that a sophisticated understanding of the three levels of trust (personal, expertise and structural) is required to be able to provide the right balance of second and third opinions. He believes that very few consultants make it to the level once known as ‘Court Courtier’ – a close and trusted attaché to an influential Prince.

Building on this firm personal affiliation, the third opinion advisory role may expand into the role of thinking partner. According to Joni (2005), this is when the relationship deepens, and in order for this to flourish, the consultant and client need to find a way to set aside the second opinion relationship. This is a new level in the affiliation and can be seen to either jeopardise the existing relationship or take it to a higher platform. The advisor needs to be many things including a sparring partner, sounding board and be prepared to get into the trenches. It is about being passionate about success and attaining real enjoyment and fulfilment from it (Joni, 2005). Once held in this esteem, there is potential for enormous two-way learning and the consultant’s personal capabilities and knowledge could grow exponentially, should they recognise this opportunity. Desouza, Awaza and Jasimuddin(2005) stress that having an inventory of external sources of knowledge is important and they must listen, recognise, identify and capture that knowledge.

Inkpen (2005) states that through membership in a network and the resulting repeated and enduring exchange relationships, the potential for knowledge acquisition by the network members is created. The more inner circles that can be explored, the more that will be learnt from the clients, and in turn be able to teach other clients. Eventually a network of thinking partners will form, and can be called upon when the need arises.  Dolezalek (2004) states that CEOs who are getting good advice from a wide range of perspectives will probably do better than those who only hear from others who think the way they do. The more enquiring and intelligent the person, the more likely they will want to engage in discussion and create a healthy level of conflict.  Joni (2005:20) tells the story of a successful CEO who stated “If I had better understood the power of having a great inner circle, balanced with the right external advisors and thinking partners, I would have been a better leader and matured to my full capacity sooner”.

In summary the  literature review covered the following key areas:

Professional contribution:

- Maintaining perceptions, self-esteem and status of the client.
- Ability to coach through assertive persuasion.
- The need for balanced decisions.
- Knowledge transfer.
- Organisational citizenship.

Personal style:

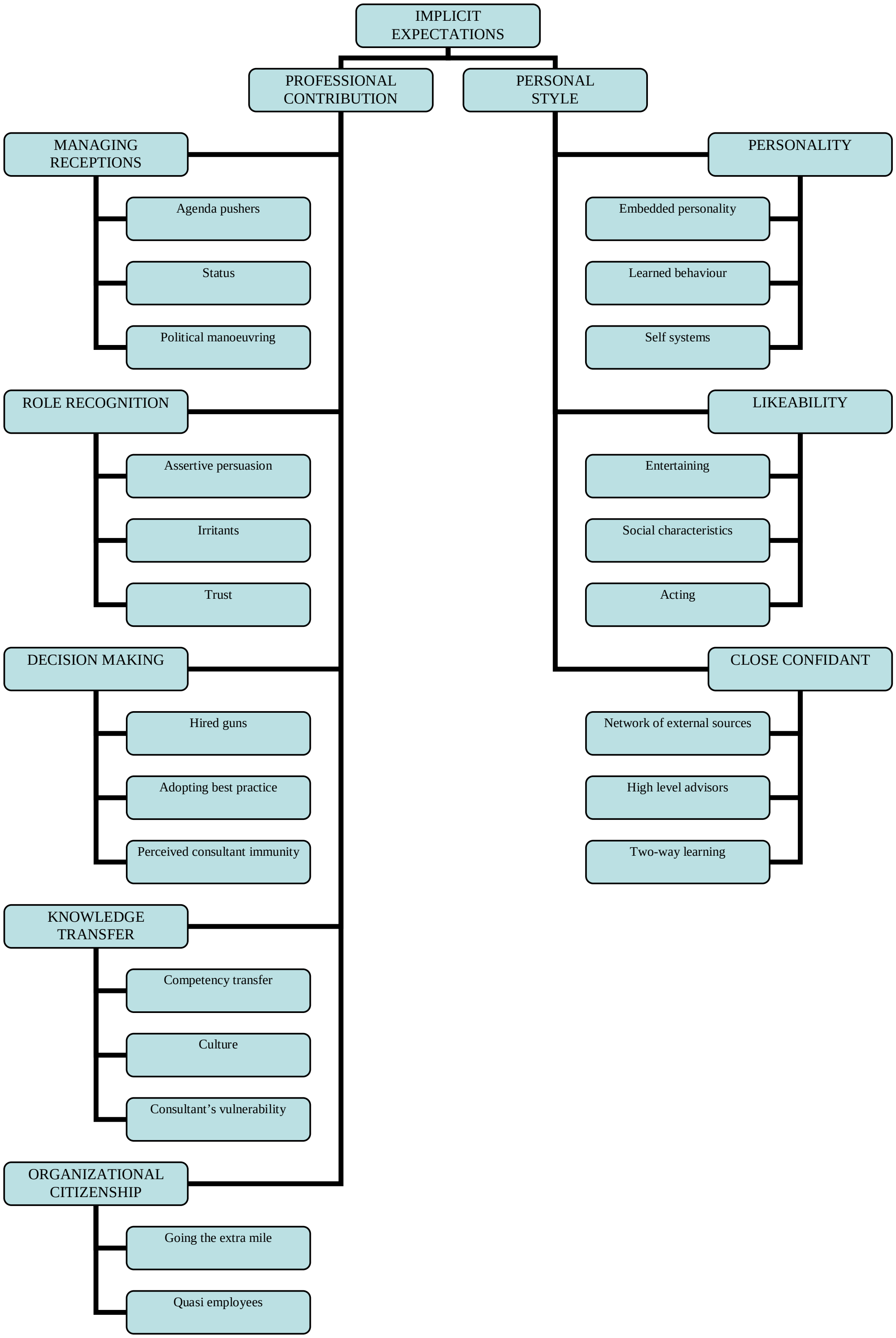
- The reliance on embedded personality to engage clients versus the effectiveness of learned behaviours in achieving the same outcome
- Social acceptance - the importance of liking or being liked.
- Entry of the consultant into the inner circle and achieving close confidant status.

**DEVELOPMENT OF CONCEPTUAL FRAMEWORK AND RESEARCH QUESTIONS**

This review of the existing literature provides an overview of those factors that are most often indicated as critical success factors in the client-consultant relationships. However, despite the contribution from practitioner literature and existing academic research in identifying and discussing those factors, a major critical point that arises by looking at this literature is the lack of structure and clarity in the discussion of the factors. Often, a number of factors are stated without any discussion about their interrelations and exact impact on project's outcomes. For example, the issue of personality has been singled out as critical by several authors but there is not a unified understanding of how it influences the client-consultant relationship. Another critical issue is the lack of clarity with regard to the connections between technical knowledge, experience and problem solving. Are they independent from each other, or rather interconnected? In addition, how do these factors influence the outcome of consulting projects? Do they also contribute to the development of trust in the client-consultant relationships as they indicate consultant’s credibility? This paper provides a research framework to explore these questions through the development of a conceptual framework.

The literature review identifies the major variables that are at play under the constructs of professional contribution and personal style. These are diagrammatically represented below in the ‘Conceptual Framework’ below:

## CONCEPTUAL FRAMEWORK



A research agenda can be constructed using a number of research questions based on the above framework. These are:

1. What is the importance placed on managing the perceptions and status of the client in relation to the outcome of the project itself?

2. What are the difficulties in managing power and control when coaching a client and how does a consultant sensitively assert opinions?

3. In what situations is it more advantageous to agree with the client's judgements and when is it better to challenge them?

4. What is the perceived residual value of knowledge transfer and does it necessarily result in competency transfer?

5. What is the clients expectation with regard to the organisational citizenship qualities portrayed by the consultant?

6. Are embedded personality traits the key factor in engaging a client or are there learned behaviours that are equally as effective?

7. How important is it to be liked, get enjoyment out of a professional relationship and have a socially fulfilling association?

8. Where do engaging executives (clients) gain their most valuable information and when should the consultant become a close confidant rather than a specialist advisor?

An exploratory research project can be initially conducted using a questionnaire (with an 'agreement' scale) along the lines provided in Appendix 1.

INSERT APPENDIX 1 HERE

**CONCLUSION**

This paper provides a research agenda with plausible lines of inquiry based on a robust conceptual framework. It lays the foundation for future research into identifying the relationship between the various significant factors identified in the consulting literature as isolated factors. For the first time, an attempt has been made to establish the interplay between these factors by deciphering the clues given in the extant literature. It now is possible to investigate these factors and their correlation through research using the research questions provided herein.

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# APPENDIX 1: SAMPLE QUESTIONNAIRE

**Please read the statements below and indicate your level of agreement or disagreement with them by ticking the appropriate box.**

## PROFESSIONAL CONTRIBUTION:

MANAGING PERCEPTIONS

| | Agree strongly | Agree | No opinion | Disagree | Disagree strongly |
|---|---|---|---|---|---|
| 1. Consultants often lose their way and push their own agendas rather than that of the client | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 2. The status of the consultant is important to add credibility to the results | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 3. Consultants use political manoeuvres to influence the right people within an organisation | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |

ROLE RECOGNITION

| | | | | | |
|---|---|---|---|---|---|
| 4. Fear of challenging the clients authority restricts the effectiveness of the consultant | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 5. Consultants should recognise the clients pet irritants and adjust there approach accordingly | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 6. The consultant must have trust in the client before they can truly act in a trustworthy manner | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |

YES-MAN OR BALANCED DECISION MAKER

| | Agree strongly | Agree | No opinion | Disagree | Disagree strongly |
|---|---|---|---|---|---|
| 7. Consultants are often engaged to confirm what the client already believes | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 8. It is generally safer for a consultant to adopt best practice than to engineer their own practices | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |

9. It is better to use consultants on sensitive projects as they are immune from insecurities and apprehension that affects employees

5☐ 4☐ 3☐ 2☐ 1☐

EXPECTATIONS OF KNOWLEDGE TRANSFER

10. It is the consultant's responsibility to ensure that knowledge transfer results in competency transfer

5☐ 4☐ 3☐ 2☐ 1☐

11. While consultants can be effective there is a greater wealth of knowledge within your organisation than without

5☐ 4☐ 3☐ 2☐ 1☐

12. Once a consultant has completed the assignment I expect to be able to continue development independently of the consultant

5☐ 4☐ 3☐ 2☐ 1☐

ORGANISATIONAL CITIZENSHIP BEHAVIOUR

13. Do you expect the consultant to go the extra-mile and beyond the specified requirements

5☐ 4☐ 3☐ 2☐ 1☐

14. Are consultant's expected to be quasi employees and portray the company values and ethos

5☐ 4☐ 3☐ 2☐ 1☐

## PERSONAL STYLE

| Agree strongly | Agree | No opinion | Disagree | Disagree strongly |
|---|---|---|---|---|

PERSONALITY

15. Personal style has far more to do with embedded personality rather than learned behaviour

5☐ 4☐ 3☐ 2☐ 1☐

16. Consultants need to alter their behaviour to fit with a diverse client base

5☐ 4☐ 3☐ 2☐ 1☐

17. Consultant's adopt defensive strategies to avoid loss of self esteem or their sense of security

5☐ 4☐ 3☐ 2☐ 1☐

THE IMPORTANCE OF LIKING OR BEING LIKED

| | | | | | |
|---|---|---|---|---|---|
| 18. Consultant's need to create an environment and atmosphere conducive to meaningful interaction | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 19. Does the consultant add more value to the project when they are socially accepted rather than not | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 20. Through words and body language consultants appear to be expert-like even if they are not | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |

CLOSE CONFIDANTS

| | | | | | |
|---|---|---|---|---|---|
| 21. The consultant needs a network of external people to be successful in business | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 22. With a high level of trust and respect consultants can be seen as close confidants and give advise on higher strategic issues that far exceed the initial brief | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |
| 23. Consultants recognize and have an appreciation of the two-way learning they acquire by assisting your organisation | 5☐ | 4☐ | 3☐ | 2☐ | 1☐ |