



# The critical success factors in the client-consulting relationship

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## Abstract

**Purpose** – The primary intent of this study is to examine recent projects involving external management consultants at a North American telecommunications firm, from the employees' point of view, to measure the extent to which the aforementioned "critical success factors" were perceived as being evident. A secondary purpose was to examine which, if any, of these factors differ between more or less successful consulting projects with a view to building a model to predict employees' perceptions of the level of the projects' success. A third objective was to gather employee opinions on the use of management consultancy and other factors that might contribute to the success of consulting projects.

**Design/methodology/approach** – A total of 102 employees responded to a questionnaire consisting of 59 questions. A model including six independent variables was able to predict overall rating of project success, with an adjusted  $R^2 = 0.68$ ,  $F = 27.81$  ( $p < 0.0001$ ). The significant variables, in order of importance, were: the solution took into account one's internal state of readiness; the project included prototyping new solutions; the project deliverables were clear; the consultant partnered with the project team throughout; the consultant was professional; and the consultant understood the sense of urgency.

**Findings** – Substantial differences were seen on most measures between projects judged "successful" and projects judged "not successful". Nevertheless, it is encouraging that many of the success factors suggested in the literature, and proposed under "an ideal client-consultant engagement", were judged as being present in management consulting projects at the telecommunications firm, to one degree or another. General opinions of management consultants were mixed and somewhat negative. Employees at the telecommunications organization do not agree with the traditional benefits of management consultants promoted by the industry.

**Originality/value** – The results of this study support the anecdotal and theoretical models, in particular those emphasizing the importance of process issues, the client-consulting relationship and their impact on project outcome.

**Keywords** Management consultancy, Employees, Project planning, Critical success factors

**Paper type** Research paper

## Introduction

Management consulting is here to stay. According to Industry Canada, the total number of management consulting establishments exceeded 26,000 in 1998, with total revenues approaching CA\$5.7 billion (Industry Canada, 2001). Since 1990, overall revenues in management consulting have grown 10-30 percent per year. Thus, the use of management consultants is very widespread. In fact, a US Department of commerce survey conducted in 1998, cited in Industry Canada's report, reported that 70 percent of all businesses and government organizations in Canada have used the services of a management consultant at least once in the last five years. Finally, they note that the management consulting industry is a key recruiter of business school graduates and



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has become a desirable employer, currently almost 40 percent of graduates in each MBA class attempt to enter the consulting industry.

Many authors have noted that, despite the size and significance of this industry, there does not seem to be a correspondingly large wealth of empirical data on the practice of management consulting. Much of the theoretical framework described is derived from anecdotal evidence. Where available, this article will draw upon empirical evidence moving from the general, to the specific focusing upon aspects of the client-consulting relationship. A simple model of key critical success factors will be proposed. Finally, the article will consider these critical success factors through a case study of a telecommunications organization.

### **Management consultants defined**

The study of management consulting can be linked to earlier work on organizational design consulting. One definition to consider for management consulting is “those who provide general management advice within strategic, organizational, or operational context, and who are institutionally organized in firms” (Canback, 1998).

That is not sufficient, however, to capture some key points about management consultancy. A more comprehensive definition is:

Management consulting is an advisory service contracted for and provided to organizations by specially trained and qualified persons who assist, in an objective and independent manner, the client organization to identify management problems, analyze such problems, and help, when requested, in the implementation of solutions (Greiner and Metzger, 1983).

This is an important elaboration upon the earlier definition. For example, it emphasizes that management consultants are truly external to the organization. Normally, management consultants would not take the place of staff within the organization. Nor would they have direct clout in an organization. Kubr (1996) notes that “objective and independent” implies a financial, administrative, political and emotional independence from the client. Further, there is an implication that the resources of a firm typically back the management consulting activities, i.e. it is typically more than a simple individual. These are the general parameters that will be used to consider management consulting in this article.

### **Why consultants?**

It is worthwhile to consider why this industry has seen such incredible growth and why it has actually been so successful. Drucker (1979) suggests management consultancy is an extraordinary and indeed truly unique phenomenon. He suggests two reasons why the industry exists. First, management skills, techniques and knowledge are best learned through exposure to and experience with many different companies in many different industries. The typical executive, however, lacks this kind of exposure. As Drucker notes, “He works with the same organization-or at most, with very few. He lacks exposure and cannot gain it. Nor can he simulate it.” Consultants, on the other hand, transcend organizations and thus gain exposure. Second, Drucker observes that executives yearn for objective insights into their management problems. Empirical research confirms that clients turn to outside consultants primarily for new ideas, proficiency, and impartiality/objectivity (Gattiker and Larwood, 1985).

McKinsey & Company suggests six reasons why hiring an external management consultant makes sense in many situations:

- (1) they provide competence not available elsewhere;
- (2) they have varied experience outside the client;
- (3) they have time to study the problem;
- (4) they are professionals;
- (5) they are independent; and
- (6) they have the ability to create action based on their recommendations (Bower, 1982).

Boston Consulting Group (BCG) has a similar perspective. It is argued consultants add significant value, by reducing the problem resolution cycle time (Hagedorn, 1982). McKinsey and BCG's opinions may not actually be supported empirically, but they provide an interesting glimpse into the industry from the consultant's point of view.

On the contrary, it can be argued that many of the skills provide by consultants should presumably be available internally in large companies, because major companies encounter most types of problems over time. Bower's (1982) points about time, professionalism and independence could certainly vary from one situation to another. Consultants could conceivably have a superior ability to create action, but unless they are using proprietary techniques this would not necessarily apply across the entire consulting industry. In fact, this may simply be a result of training. One cannot, however, dispute that there are opportunities for consultants to bring perspective from other industries (Canback, 1999).

An empirical study based on interviews with more than 200 internal consultants at various companies disputes Bower and Henderson's views. Kelly (1979) suggests that external consultants are actually more expensive than internal consultants, they are not necessarily available at the right time and they can lack the understanding of the client's environment. Kelly supports the notion of internal consultancy, going so far as suggest that internal resources will carry out consulting work in the future and that external consultants will be use only for special problems and when there is a need to augment internal resources. Canback's (1999) opinion is that external consultants can be cost effective, available, and adept at understanding their client's problems and circumstances. Given the context of why management consultants are used, the next section will examine aspects of the role that consultants play in organizations.

### **The role of the consultant**

Schein (1990) has identified three broadly accepted models of consultation: purchase of expertise, doctor-patient, and process consultation:

- (1) Purchase-of-expertise suggests that clients are looking for consultants to provide independent perspective to bear on specific challenges hand. There is no expectation to focus on the client relationship *per se*, but rather to provide expertise in a detached manner.
- (2) The doctor-patient model has the consultant focusing on using a diagnostic approach to examine the client organization's problems. From their distinct experience, knowledge and diagnostic abilities the consultants identify strategic and organizational problems. This model emphasizes the importance of building a strong relationships and developing trust between the client and the consultant.

- (3) The process consultation model considers the consultant as a facilitator with the client actually providing much of the relevant expertise. There is a clear distinction of roles and tasks. In the end the client chooses what to do about the problem. The consultant provides more of the framework and methodology for defining the problem and the best possible alternatives.

Alternatively, Nees and Grenier (1985) propose five categories of consultants:

- (1) *The mental adventurer* analyzes truly intransigent problems such as long-term scenarios for country development, by applying rigorous economic methods and leveraging his or her experience base.
- (2) *The strategic navigator* bases his or her contribution on a rich quantitative understanding of the market and competitive dynamics, and then recommends courses of action without too much regard of the client's perspective.
- (3) *The management physician* derives his or her recommendations from a deep understanding of the internal dynamics of the client organization, often willing to sacrifice some objectivity to gain a realistic perspective on what is achievable.
- (4) *The system architect* impacts his or her clients by helping redesign processes, routines, and systems – always in close cooperation with the client.
- (5) *The friendly co-pilot* counsels senior managers as a facilitator rather than as an expert, and has no ambition to provide new knowledge to the client (Nees and Grenier, 1985).

Nees and Grenier's model shows many similarities to Schein's (1990) study, for example the mental adventurer can be considered similar to the expert, the strategic navigator, management physician and system architect correlate with the "doctor-patient" model and the friendly copilot aligns with the process-consultation model. Institutionally organized strategy consultants are found primarily in the strategic navigator and management physician segments.

In any event, consultant engagements beyond simply purchasing expertise require the development of a relationship between the consultant and the client. Turner (1982) proposed a continuum with eight categories of client-consultant relationships. His framework used a hierarchy of tasks to illustrate the level of extent of a client's involvement with a consultant. The eight task categories identified are:

- (1) providing information to a client;
- (2) solving a client's problem;
- (3) making a diagnosis, which may necessitate redefinition of the problem;
- (4) making recommendations based on the diagnosis;
- (5) assisting with implementation of recommended actions;
- (6) building a consensus and commitment around a corrective action;
- (7) facilitating client learning; and
- (8) permanently improving organizational effectiveness.

Turner argued that until the late 1970s, consultants tended to work more as suppliers to the client. Increasingly relationships in consulting engagements have evolved to

build more of a partnership of mutual respect aimed at fundamentally improving the client's effectiveness.

In a review of the consultancy literature, Canback proposed the following trends:

- management consultants increasingly address critical, long term issues and are a critical part of the intellectual agenda of executives (Turner's lower three points);
- consultants add value by addressing both content and process issues based on expertise, methodology and general problems solving skills (corresponding to Schein's expert and doctor-patient models);
- management consultants work together with their clients in a complicated and fluid relationship characterized by a high degree of mutual trust; and
- management consultants are best organized in independent, specialized firms with unique characteristics and success factors (as argued by Bower and Henderson) (Canback, 1999).

As management consultants focus on higher order task categories, the relationships with their clients are potentially becoming increasing complex. To further understand client-consultant dynamics, the next section of the article addresses the concept of client.

### **The role of the client**

In discussing consultancy, it is important to clarify the concept of client. Schein points out that any helping or change process always has a target or a client (Schein, 1997). There is an assumption, for instance, that the client is always clearly identifiable, when in reality the question of the client actually is can be "ambiguous and problematic." There can be complicated dynamics around this very issue. Schein proposes a simplifying model to understand types of clients and types of client relationships. In Schein's model, six basic types can be distinguished:

- (1) *Contact clients* – the individual(s) who first contact the consultant with a request, question, or issue.
- (2) *Intermediate clients* – the individuals or groups who or which *get involved* in various interviews, meetings, and other activities as the project evolves.
- (3) *Primary clients* – the individual(s) who ultimately "own" the problem or issue being worked on; they are typically also the ones who pay the consulting bills or whose budget covers the consultation project.
- (4) *Unwitting clients* – members of the organization or client system above, below and laterally related to the primary clients who will be affected by interventions but who are not aware they will be impacted.
- (5) *Indirect clients* – members of the organization who are aware that they will be affected by the interventions but who are unknown to the consultant and who may feel either positive or negative about these effects.
- (6) *Ultimate clients* – the community, the total organization, an occupational group, or any other group that the consultant cares about and whose welfare must be considered in any intervention that the consultant makes (Schein, 1997).

Thus, concept of client is not straightforward. Different types of clients may well have different needs, expectations, influence and degrees of participation in the consultancy.

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The consultant, in fact the team, has to be clear as to who the client actually is at all times in the project.

It is important to consider experiences from the clients' and consultants', in more detail, to understand the nature of these relationships initially from the client's point of view, and then the consultant's.

### **What clients say about consultants**

Vogl found that clients look for new ideas and an objective perspective. Interviews with 250 executives confirmed that clients are looking for expert advice (Vogl, 1999). There is also an expectation that consultants will transfer their competencies to company personnel. Their decisions on which consultant to hire are based on prior performance, and the consultant's understanding of the potential client's needs. Not all aspects of the projects were positive. Consultants are expensive. Also, many respondents identified concerns regarding their own employees and a potential backlash to the fees paid to consultants. Beyond price, implementation of the consultant's recommendations and the consultants lacking sufficient knowledge of the hiring company were voiced as concerns of the executives. Finally, consulting groups often lack people who have been in an operating business at a high level. This, no doubt, is a consequence of the trend for consulting companies to hire their staff directly from universities.

In another large survey, several common gaps in consulting projects were identified and several opportunities for improving the consulting experience are highlighted (Smith, 2002). For instance, management needs to involve consultants in the implementation phase. Consulting projects must take time to solicit inputs for implementation planning. Stakeholder information is also a critical input. Proper project management process must be followed. The impacts on employees must be considered and solutions provided to help employees deal with change. There must also be effective guidance of senior management. Feedback also suggests that there cannot be personal gain at the expense of the project stakeholders. Finally, the project must contribute to breakthrough ideas. Weakness in any of these areas can contribute to poor outcomes of the consulting projects.

Smith's (2002) discussion suggests that consulting activities and client objectives cannot occur without project outcomes that are clearly understood by both parties and stresses the importance of good communication between the client and the consultant, with senior management. Again, in the ideal the consultant should be kept on for implementation phase. However, structures, technology, staffing and systems must be put in place in order to effect the change.

Other issues to consider include those highlighted in a study by Fullerton and West, including up-front work, getting to learn the organization and avoiding cookie-cutter solutions (Fullerton and West, 1996). Clients require consultants to appreciate the client's situation, and that they take into consideration not being overly theoretical. Finally, clients want tailor made solutions, which reflect the challenges they face, not formulas applied as universal panaceas.

Gable examined client success, when engaging consultants in the IT world and proposed a multidimensional model of client success. It suggests success is driven by multiple outcomes including consultant recommendations, client understanding and consultant performance. Objective measures could include usage/acceptance of the

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recommendations, change in client understanding and actual versus estimated resource requirements (Gable, 1996).

Rynning (1992) offers a tentative list of factors contributing to consulting “success” worthy of further investigation, including:

- clarity in need/problem formulation;
- number/quality of new ideas;
- new knowledge;
- special planning;
- new ways of thinking;
- level of planning;
- level of co-operational abilities;
- management of time;
- planning capabilities;
- efficiency of execution;
- strategy formulation;
- problem solving;
- implementation;
- follow-up; and
- economy.

Carucci and Tetenbaum (2000) describe a model of three destructive roles that consultants can assume the messiah, the dependency-builder, and the colluder. These roles can emerge when consultants are motivated by self-interest or have inflated egos that interfere with properly assessing the client’s capabilities. Alternately, the way that consultants can create value is through an “unswerving commitment to positive client change”. They emphasize “using every skill available to support the client, while pushing the client forward, often against great resistance.” Three alternative, positive value adding roles are suggested include the partner, who establishes mutual accountability and ownership of engagement objectives, process and outcomes; the capability-builder focuses on enhancing the client’s capacity to solve similar problems with its own resources; and the truth teller who builds active and accurate feedback systems with the client. Many dimensions have been discussed, from the clients’ point of view. The consulting issue will be examined from the consultant’s point of view.

#### **From the consultant’s point of view**

Consultants also have issues regarding consulting engagements. Personal characteristics of the client they value include, willing to learn, bright, catches on quickly, accepts feedback non-defensively, willing to take risk and responsible to follow through; contact person characteristics including role clarity, respect for their competence, liking each other and independent decision making; and client organizations with budget control, respect of superiors and access to political information (Kellogg, 1984). Results orientation, intellectual curiosity, optimism, self-confidence and ambition have also been highlighted, by Carucci and Tetenbaum,

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as client attributes most consistently appearing on consultants' wish lists (Carucci and Tetenbaum, 2000).

Several issues have turned up repeatedly in examinations of OD consulting success. In a large survey of OD practitioners, Burke *et al.* (1984) identified differences between successful and unsuccessful projects in each of the consulting phases. In the entry phase, the power of the client with whom the practitioner works, their readiness to change and their willingness to assume responsibility for the effort and its outcome are all positively related to success. In the contracting phase, clarity is critical. In the diagnostic phase, successful projects use a model to organize data, moreover access to organizational resources is key. In the feedback phase the consultant's confidence in the diagnosis, and the client's affirmation of the data are critical factors. In planning change, it is important to test plans and remain flexible. For intervention, without supporting changes such as reward systems or management style, structural changes will fail. Finally, in evaluation practitioners reporting successful projects were more likely to conduct evaluations, and more satisfied with their evaluation phases (Burke *et al.*, 1984).

Fullerton and West (1996) considered both sides of the relationship. Feedback from consultants suggests additional client factors that are key to a consulting project's success. For instance, it is important that clients have to have a clear question. They must also take ownership of the problem being addressed. Clients must be willing to change according to the project's recommendations. They must also have the organizational leverage to act on the consultant's recommendations. Finally, consultants want to be viewed as credible by the client (Fullerton and West, 1996).

In the next section, we consider the process by which consultants and clients work together, or the consultant engagement process.

### **Success factors of the consultant engagement process**

Armenakis and Burdick (1998) published an extensive review of consultation research up to the late 1980s. One key area proposed for further research is that of consultation success. Many investigations have cited criterion problems in determining the success of consulting efforts. They note that "hard" criteria, such as productivity and profitability are often not applicable to consultant programs. Instead, much of the research on consultation is based on criteria that such as self-reported measures of satisfaction, leadership and group process. Further, early studies of OD effectiveness tended to focus on comparisons between techniques used, rather than the actual behaviors exhibited by consultants during the intervention process.

O'Driscoll and Eubanks (1993) applied a behavioral competency model to organizational development interventions to assess perceived frequencies of a range of consultant behaviors, goal setting activities and their contribution to overall consultation effectiveness (O'Driscoll and Eubanks, 1993). The indicators of effectiveness they used included organizational outcomes, organizational processes and characteristics of the consultation itself. Major contributors to effective consulting, for consultants, were data utilization and setting of specific goals. Consultants who gathered information about the organization to increase their understanding of the group they were working with and to develop their intervention, who interpreted data for the client, and who provided feedback to the organization rated their OD program more highly; as did those who believed their intervention goals had been specific.



These were also significant factors from the clients' point of view. Additional factors for clients, relating to successful outcomes, included having goals that were measurable and set by management, along with the consultant displaying competency in interpersonal skills and group process management.

O'Driscoll and Eubanks (1993) highlight the importance of gathering and interpreting information about the organization when designing and implementing OD interventions to both consultants and clients.

Ford suggests that insufficient clarity is at the heart of most poor client-consulting relationships (Ford, 1985). Failure to communicate, to identify the real problem, promising too much too soon, failure to specify roles and recommending unfeasible actions will all jeopardize the engagement.

How the consultant puts together the consulting process will affect the relationship with the client and possible future employment (McLarty and Robinson, 1998). They describe task processes found in most consulting relationships, such as contract role, clarification, data generation, prioritization, actions and follow-up, as well as more subtle process issues related to interpersonal approaches and responses.

Both parties (the client and the consultant) can influence and contribute to the success of the consulting project by focusing on such process issues.

McLachlin (1999) has several propositions, based on the literature, on aspects that are necessary, but not sufficient, for a successful consulting engagement. Consultants must exhibit integrity, in particular by always putting the client's best interest first. Clients must be involved in the project, and ready to change. It is key that there be a clear agreement, which may or may not be a formal contract, concerning project requirements and expectations. The client must ultimately control the engagement, partly by using clear and limited assignments. The consultants must be competent. Finally, there must be a good fit between clients and consultants along a number of dimensions, including models of consultancy, client expectations, consultant capabilities, and consultant type (McLachlin, 1999).

Schaffer (2002) argues that the majority of clients that hire consultants, and most of the consultants that they hire, operate under a model of consulting that does not allow them to achieve full collaboration. Instead "it is typically expected that the consultants are accountable for creating the best possible solutions and tools, while the clients are accountable for using those solutions and tools to produce the improved results" (Schaffer, 2002). Schaffer further describes a model of three specific outcomes necessary for a consulting project to be considered a success. First, the consultant must provide a solution or a method new to the client. Second, the client must achieve measurable improvement in its results by adopting the client's solution. Third, the client must be able to sustain the improvement over time. Consultants must be effective change agents and, further, they must join in accountability for the end result of their projects.

Schaffer (2002) describes the existence of an "implementation gap", that is the difference between all that the client would have to do to benefit from the consultant's recommendations and what the client is able of doing. He suggests that five factors or "fatal flaws" of conventional consulting increase the risk that an implementation gap will undermine the consulting project:

- (1) consulting projects are defined in terms of the work the consultant will do and the "product" the consultant will deliver, but not in terms of specific client results to be achieved (project is about change, not effecting change);

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- (2) project scope is determined mainly by subject to be studied or the problem to be solved, with little regard for the client's readiness for change (ability, motivation, sense of urgency);
  - (3) projects aim for one big solution rather than incremental successes;
  - (4) projects entail a sharp division of responsibility between client and consultant; there is little sense of partnership between them; and finally
  - (5) projects make labor-intensive use of consultants, instead of leveraged use.

Offering an alternate "high-impact" paradigm, which aligns well with much of the literature described so far, Schaffer suggests that key critical success factors are beginning with results, designing projects to match client motivation and dividing large projects into rapid cycle subprojects. Beginning with the results reinforces the notion of customizing the approach, aligning the client and consultant by focusing on a few critical results with clear, measurable short-term goals. Design projects to match client motivation and capability emphasizes that the project must carry a real sense of urgency at all levels, i.e. it must be done. It also links to ownership of the project, i.e. if people see that success depends on them, they will assume the responsibility. Dividing large projects into rapid-cycle subprojects implies proving in success quickly, through manageable phases and prototyping. It also enables the project team to rapidly absorb, use and benefit from solutions and build support by demonstrating quick wins. Schaffer's model (2002) also stresses process issues presented earlier, including extensive project communication and visible support of senior executives to set clear expectations for internal employees. Based on what has been presented so far in this article, the next section proposes a model of key success factors for an ideal client-consultant engagement.

### **Success factors for an ideal client-consultant engagement**

It is generally accepted that how the consultant puts together the consulting process will affect the relationship with the client and consequently the success of the project. Based on the anecdotal views, conceptual frameworks and empirical studies described above, it is suggested that consulting engagements which possess the following success factors will lead to more favorable project outcomes:

- competent consultants;
- an emphasis on client results vs consultant deliverables;
- clear and well communicated expectations and outcomes;
- visible executive support;
- an adaptation to client readiness;
- an investment up front in learning the clients environment;
- defined in terms of incremental successes;
- real partnership with consultants; and
- inclusion of the consultants through the implementation phase.

The next section of the article will describe a case study of consulting projects at the telecommunications organization under study, developed specifically using the model of success factors listed above.

### **The case study: what is the problem?**

In this case study, the telecommunications organization is no different from most major corporations in North America. External management consultants play an increasing role in formulation of business decisions. The telecommunications organization's holding company, spent hundreds of millions of dollars on consultant projects in 2002-2003. Anecdotal evidence suggests that not every consultant engagement is the same.

There are four objectives for this case study analysis as follows:

- (1) The primary intent of this study, is to examine recent projects involving external management consultants at the telecommunications organization, from the employees' point of view, and to measure the extent to which the aforementioned "critical success factors" were perceived as being evident.
- (2) A secondary purpose is to examine which, if any, of these factors differ between more or less successful consulting projects with a view to building a model to predict employees' perceptions of the level of the projects' success.
- (3) A final objective is to gather employee opinions on other factors that might contribute to the success of consulting projects.
- (4) A final, objective is to gather general employee opinions on the use of management consultancy at the organization.

### **Methodology**

Data for this study was collected via a confidential survey of the telecommunications organization employees. Due to the perceived sensitivity of this topic area, and to encourage a high level of participation, the survey was completed anonymously. A random sample of 250 middle and lower level managers was selected from the current company directory. The managers were selected from several departments judged to employ external management consultants, including human resources, enterprise services, corporate communications, marketing research and marketing. The instrument was developed specifically for this study, drawing upon available literature and conceptual models.

A total of 102 employees responded to the bilingual questionnaire and the final response rate was 41 percent. This was well above the target response rate of 30 percent. Very basic demographic information, such as employee level, tenure and department were collected to gauge how representative the respondents were of the sampled population. The demographic profile of respondents was comparable to the population sampled.

A total of 77 respondents (75 percent) completed the survey in English, 25 (25 percent) in French. Directors accounted for 21 percent of respondents, 54 percent were team leads and the remaining 25 percent were first-level managers.

### **Measures**

The questionnaire consisted of a total of 59 questions that were developed as a result of the literature. The critical findings of a number of studies were incorporated into this instrument that was pre-tested (pilot study) for validity and reliability. Respondents were asked whether, or not, they had detailed knowledge of a project involving an external management consultant in the past two years. If so, they were asked to think of the project they were most familiar with and keep it in mind while completing the first section of the survey. A series of statements were presented and respondents were

asked to indicate they degree to which they agreed that the statements applied to the consulting project. Items focused on the initial stages of the project, the consultant, the objectives, deliverables, and the overall project including multiple outcome measures. The second section of the questionnaire included a series of questions related to perceptions of the use of management consultants in general at the telecommunications organization. Statements included in the questionnaire were designed to elicit responses on the success factors described in the “ideal” client-consultant engagement already discussed.

**Results**

An impressive 84 percent of respondents indicated that they were personally familiar with specific projects at the telecommunications organization involving external management consultants in the past two years. Almost 80 percent of these individuals were either part of the project team (45 percent) or interacted with the consultant during the project (34 percent). An additional 11 percent did not fall into the first two categories, but were affected by the project outcome. Only 8 percent of the respondents were only indirectly familiar with the consulting project.

Only six respondents, in total, were actually involved in the hiring decision. This is somewhat less than might have been initially expected, suggesting that the hiring decisions may well be taken above director’s level.

The first set of questions related to specific consulting projects, respondents were asked to indicate the extent to which they agreed with a series of statements about that project. The response was measured on a ten-point scale, from totally disagree (1) totally agree (10). For this analysis, percentage agreement was calculated using ratings of seven and above. A response of less than 7 was not taken as evidence of overwhelming agreement to any statement. In addition, the mean score for each item was calculated. The first set of questions, shown in Table I, addressed initial project expectations.

There were mixed opinions on the first three items relating to management expectations and roles on the project. Just over half of the respondents agreed positively that management’s expectations for the project were clear; the average score for this item was 6.4 (out of 10). This may actually suggest more collaborative engagements, in which the consultants and clients work more as a team. Table II examined the respondent’s evaluation of the consultant.

According to respondents, the consultants’ relative strengths appeared to be their professionalism, their understanding of clients’ sense of urgency and motivation, and their communication with the team.

| Item  | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|---|----------|---------------------------------------|------------|
| Management’s expectations for the project were clear  | 86       | 53                                    | 6.4        |
| Management’s expectations for the project were well communicated  | 85       | 39                                    | 5.8        |
| There was a clear division of responsibility between the telecommunications organization’s employees and the consultant’s employees | 84       | 43                                    | 5.7        |

**Table I.**  
Initial project

**Table II.**  
The consultant

| Item   | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|--|----------|---------------------------------------|------------|
| The consultant was professional  | 82       | 90                                    | 7.9        |
| The consultant communicated well with the team   | 82       | 61                                    | 6.7        |
| The consultant shared in the project risk  | 82       | 35                                    | 5.2        |
| The consultant took time to learn the telecommunications organization's environment        | 82       | 44                                    | 5.9        |
| The consultant understood our internal abilities   | 82       | 38                                    | 5.3        |
| The consultant understood our motivation   | 81       | 65                                    | 6.9        |
| The consultant understood our sense of urgency   | 81       | 73                                    | 7.3        |
| The consultant emphasized what changes were necessary to meet the objectives               | 81       | 49                                    | 6.4        |
| The consultant emphasized how to effect the changes at the telecommunications organization | 81       | 32                                    | 5.6        |
| The consultant defined the project in terms of specific client results                     | 79       | 43                                    | 6.1        |
| The consultant defined the project in terms of their own specific deliverables             | 78       | 60                                    | 6.4        |

Respondents definitely agreed that the consultants working on the projects were professional, with 90 percent positive and a mean rating of 7.9. In terms of understanding the client's sense of urgency, responses were 73 percent positive, with a mean score of 7.3. They were also rated quite positively for their communication with the team, 61 percent agreeing with an average score of 6.7. That should not be entirely surprising, as the organization typically works almost exclusively with the top tier consulting companies in the industry. Many have long standing relationships with the telecommunications organization. It is important to note then, that there appears to be evidence of these key factors appearing rather consistently in the consulting projects that were rated.

Responses were more mixed, on several items related to the degree to which the consultant focused on the clients, such as the consultants' taking time to learn about the organization's environment, with 44 percent positive and a mean of 5.9; emphasizing the changes necessary to meet the project objectives, with 49 percent positive and a mean of 6.2; and defining the project in terms of client results with 43 percent positive and a mean of 6.1. While these dimensions are evident in the consulting projects, they are not judged to be present as consistently across the projects. That is, almost half of respondents did not agree that they were positively displayed.

Weaker items for the consultants were those loosely related to the motives of the consultants, and the fit of their work with the firm under study. For example, there did not seem to be much perception of shared risk with only 35 percent of respondents agreeing that the consultant actually shared in the project risk and a mean of 5.2. Intuitively this sounds like an appealing approach to consulting, but it does not seem to be prevalent in the working relationships at the organization. Also, consultants' understanding of the organization's internal abilities was considered low, at 38 percent agreement and a mean of 5.3. In a large organization like this telecommunications firm, there is a wide range of capabilities. Consultants were judged less approvingly on emphasizing how to effect the changes at the firm, with 32 percent positive and a mean of 5.6. Implementing change in an organization as large as the one under study, can be

daunting so intuitively this is a huge requirement. Finally, consultants were judged as tending to define the project in terms of their own specific deliverables, with 60 percent agreement and a mean of 6.4.

This is contrary to a customized approach, or one that incorporates the unique needs of the project team. In the case of these weaker items then, the majority of respondents judged them as being absent from the projects they were rating.

The next set of questions relate to project objectives and project deliverables.

Table III presents the ratings of items related to project objectives and Table IV presents ratings on items related to the project deliverables. Responses were mixed on these two issues overall.

The strongest rated item relating to project objectives was that related to the short-term focus, with 64 percent agreement and a mean score of 6.5. Slightly more than half of respondents considered the objectives as clear, with 56 percent agreement and a mean score of 6.5. There was less support to the measurability and communication of the objectives, with agreement of 43 percent and 45 percent respectively and mean scores of 6.1 each. Finally, 40 percent of respondents agreed that the project focused on the long term.

The clarity of the project deliverables was judged slightly lower than the objectives, at 48 percent agreement and a mean score of 6.1. The measurability and communication of the deliverables was comparable to the objectives, with agreement of 41 percent and 42 percent respectively and mean scores of 5.9 and 6.0 respectively. Only about a third of respondents agreed that the project deliverables included an implementation plan, with 34 percent agreement and a mean score of 5.3. This is weak support for this success factor in consulting projects. Next, items rating the overall project are examined.

Table V presents the ratings of items related to the overall project.

| Item  | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|---|----------|---------------------------------------|------------|
| The project objectives were clear                     | 81       | 56                                    | 6.5        |
| The project objectives were measurable                | 81       | 43                                    | 6.1        |
| The project objectives were well communicated         | 80       | 45                                    | 6.1        |
| The project objectives were focused on the short term | 80       | 64                                    | 6.7        |
| The project objectives were focused on the long term  | 80       | 40                                    | 5.5        |

**Table III.**  
Objectives

| Item   | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|--|----------|---------------------------------------|------------|
| The project deliverables were clear                      | 79       | 48                                    | 6.1        |
| The project deliverables were measurable                 | 79       | 41                                    | 5.9        |
| The project deliverables were well communicated          | 79       | 42                                    | 6.0        |
| The project deliverables included an implementation plan | 79       | 34                                    | 5.3        |

**Table IV.**  
Deliverables

**Table V.**  
Overall project

| Item  | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|---|----------|---------------------------------------|------------|
| There was strong executive support for the project              | 81       | 88                                    | 8.3        |
| The project was organized into manageable phases                | 81       | 52                                    | 6.0        |
| The project included prototyping new solutions                  | 79       | 46                                    | 5.4        |
| The project outcomes were measurable                            | 78       | 42                                    | 6.0        |
| The project outcomes were well communicated                     | 80       | 38                                    | 5.8        |
| The project took into account our internal state of readiness   | 79       | 30                                    | 4.9        |
| The consultant partnered with the project team throughout       | 80       | 54                                    | 6.3        |
| The consultant was available to implement their recommendations | 78       | 46                                    | 5.7        |

Most notably, there was keen agreement to the level of executive support given to the consulting projects rated. A full 88 percent of respondents agreed that there was strong for the project, with a mean score of 8.3.

Only comparable levels of agreement were seen for the project outcomes being measurable with 42 percent agreement and a mean score of 6.0. Just over half, or 54 percent of respondents agreed that the consultants partnered with the project team. Finally, only 46 percent of respondents agreed that the consultant was available for the implementation phase of the project, so they were not considered available over half of the time.

Weaker items are generally linked to the outcome of the project. For example project outcomes were not considered well communicated, with 38 percent agreement and a mean score of 5.8. Only 30 percent of respondents agreed that the project took into account the internal state of readiness, with a mean score of 4.9. This suggests there may well be implementation issues as a result. The next section considers project outcomes.

Several items were included to gauge aspects of how successful the project was. Table VI presents the ratings of these items.

Ultimately only 41 percent of respondents agreed that the initial project objectives were achieved, with a mean score of 5.8. This suggests either the projects were judged as incomplete, or the final objectives achieved differed from initial. The last three items were included to help assess perceived impact of the project. Finally, only 22 percent of respondents indicated that the project changed the organization's organizational

**Table VI.**  
Outcomes

| Item   | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|--|----------|---------------------------------------|------------|
| The initial objectives were achieved   | 80       | 41                                    | 5.8        |
| The project improved the telecommunications organization's performance           | 78       | 32                                    | 5.2        |
| The project improved the telecommunications organization's capabilities          | 78       | 38                                    | 5.4        |
| The project changed the telecommunications organization's organizational culture | 78       | 22                                    | 4.4        |

culture. This may well be misleading measure, however. It is not necessarily an objective of every consulting project to change the culture at a telecommunications organization.

A final question was included to gather respondents' impressions of the overall success of the consulting project. Figure 1 shows the distribution of responses to this question.

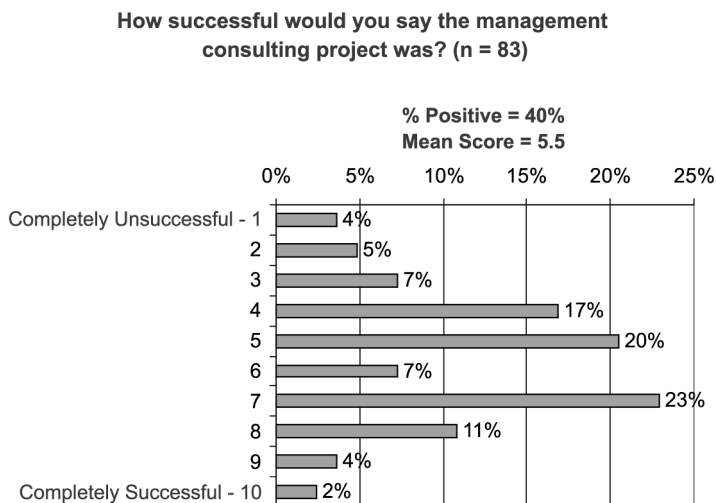
Surprisingly, responses to this question were quite widely distributed. Some 16 percent of respondents rated the project as quite unsuccessful. Another 44 percent rated the project as only moderately successful while the remaining 40 percent of respondents rated the project as successful. Only 2 percent of respondents considered the management consulting project "completely successful". The mean score for all responses was 5.5, suggesting there were certainly opportunities for improvement. Given the results in Tables I-VI, this is not entirely surprising.

The last question in this section of the survey included an open-ended question on what other issues contributed to their rating of the level of success of the management-consulting project. A total of 32 respondents, almost 40 percent, provided additional detailed feedback and list of the themes most frequently mentioned are shown below:

What other issues, not covered above, do you feel contributed to your rating of the level of success of the management consulting project:

- Failure to understand the organizations operating environment.
- Ignoring internal skills/information available.
- Unrealistic solutions.
- Lack of "buy-in" for the project.
- Cost/benefit of project.
- Poor teamwork (us vs them).
- Insufficient support for implementation?

In most cases, the comments pointed to those issues having negative impacts on the project. Not all comments were negative, however. Several examples of positive



**Figure 1.**  
Success



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experiences were shared. Thus a broad range of responses were observed on the items related to a specific consulting project, highlighting specific “process” related issues. The next section examines how “successful” projects differ from others, on these dimensions.

### Success factors

The second objective of this study was to see which, if any, of these factors might be able to predict the respondents’ rating of how successful they said the management consulting project was. First, “successful” projects are compared to all others on each of the measures. Figures 2-4 present responses to all of the items described previously, but respondents were grouped by their by rating of project success. Again, scores of 1 through 6 were considered “Not successful” and scores of 7 and greater were considered “successful”. Successful projects were rated higher on all of the measures.

The largest differences in Figure 2, i.e. mean score differences of more than 2 points, included the consultant shared in the project risk (6.8 vs 4.2), took time to learn the organization’s environment (7.3 vs 4.9), the consultant understood our internal abilities (6.7 vs 4.4) and the consultant emphasized what changes were necessary to meet the objectives (7.6 vs 5.5).

From Figure 3, the largest differences were on how the consultant emphasized how to effect the changes at the organization under study (6.8 vs 4.7), the project objectives were well communicated (7.4 vs 5.2), the project objectives were focused on the long term (6.7 vs 4.7), and the project deliverables included an implementation plan (6.5 vs 4.5).

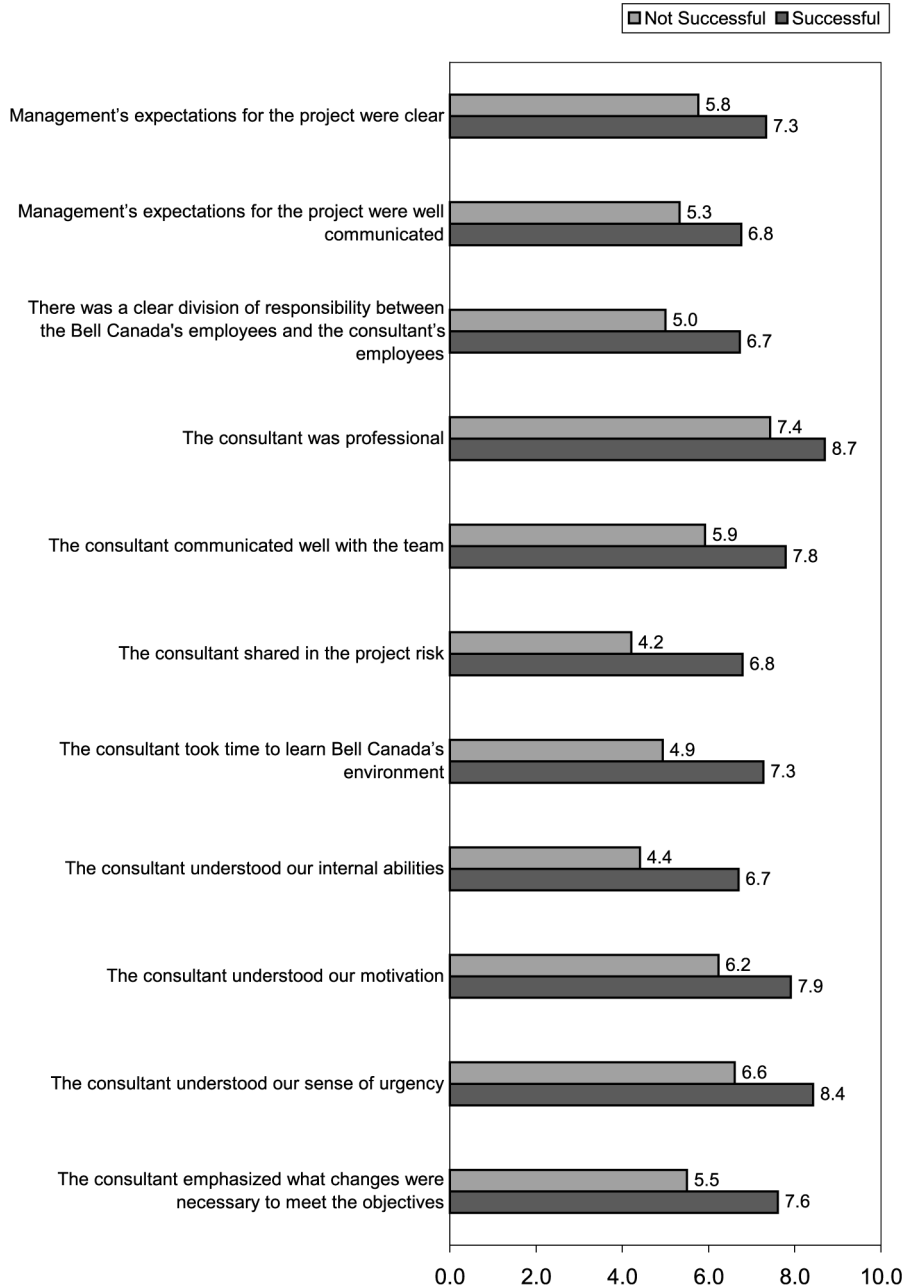
From Figure 4, the successful projects rated more than two points higher on the project were organized into manageable phases (7.2 vs 5.2), the project included prototyping of new solutions (6.7 vs 4.6), the project outcomes were measurable (7.2 vs 5.2), the project outcomes were well communicated (7.2 vs 4.9), the project took into account our internal state of readiness (6.5 vs 3.9), the consultant partnered with the project team throughout (7.5 vs 5.4) and the consultant was available to implement their recommendations (7.2 vs 4.7).

Not surprisingly, the other outcome measures had large differences. That is, the initial objectives were achieved, the project improved the organization’s performance, the project improved the telecommunications organization’s capabilities and even the project changed the organization’s culture. The average rating for successful projects was 7.6 versus 4.1 for unsuccessful projects.

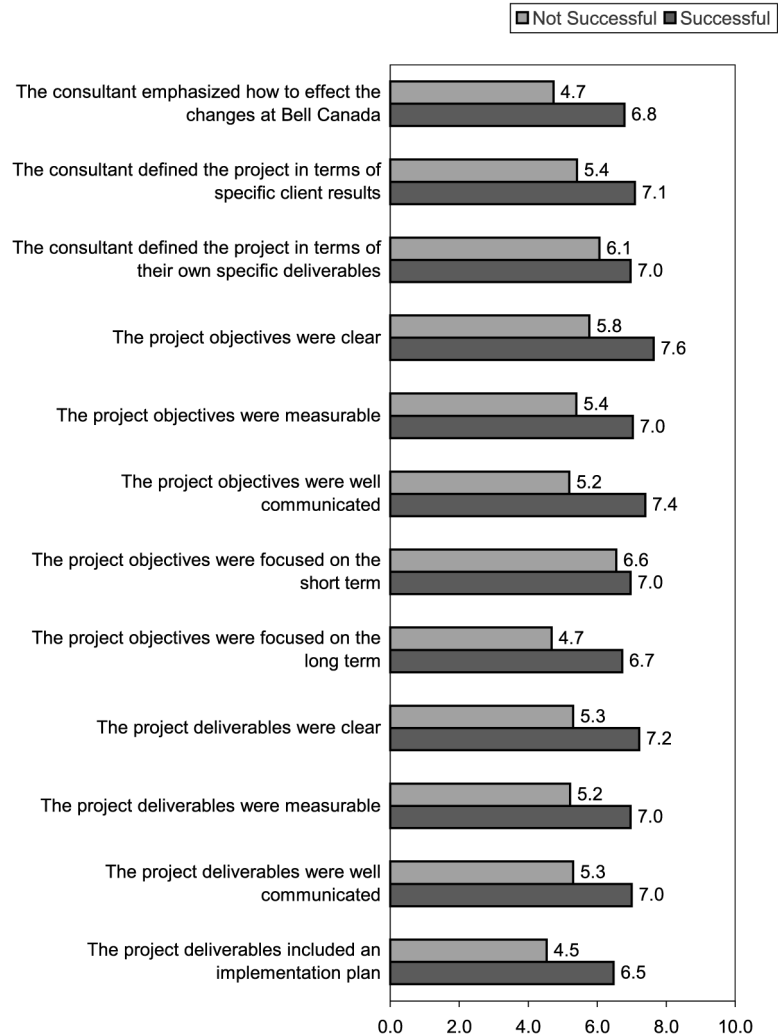
### Regression model

The last step in this phase of the analysis was to see if it was possible to construct a simple model to predict ratings of overall project success.

To do this, a stepwise linear regression procedure was used to construct a model. In the first case, the dependent variable used was the rating of project success (from 1 to 10). The independent variables included the respondents’ ratings of all aspects of the project, excluding the outcome measures (listed in Table VI). Stringent criteria of  $p < 0.25$  for model entry, and  $p < 0.05$  for model retention were used. The CP statistic was examined at each step to find an optimal number of variables for inclusion in the model.



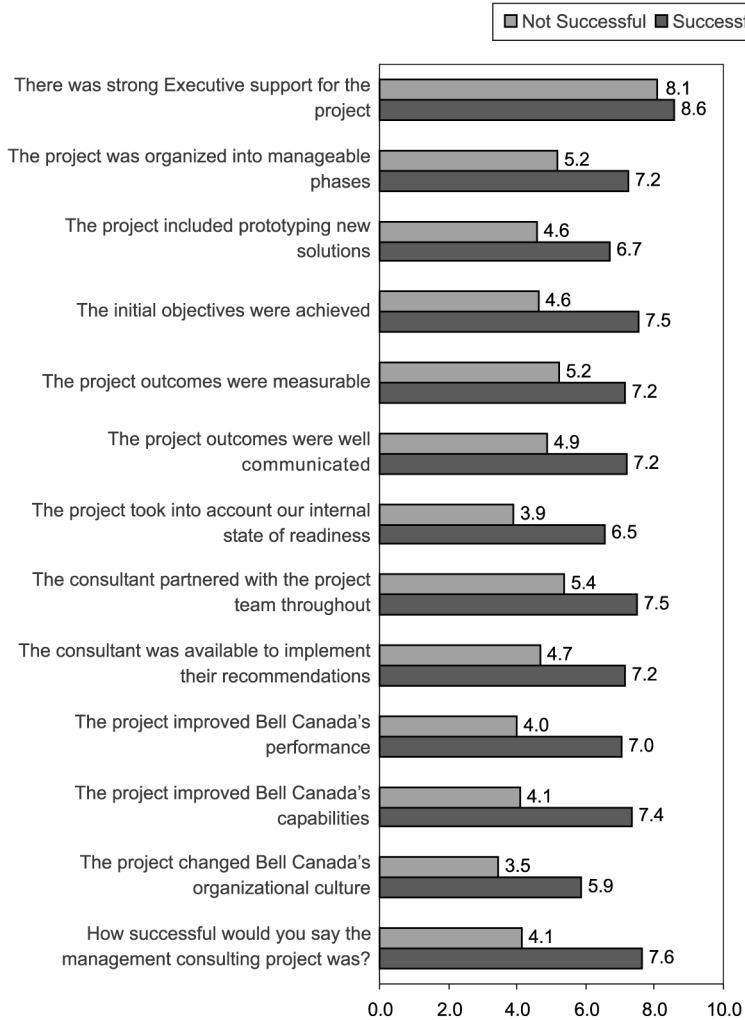
**Figure 2.**  
Successful projects



**Figure 3.**  
Successful projects

Residual plots were analyzed, the sign pattern of the model coefficients evaluated, the significance of the parameter estimates was considered, VIF checked for co linearity, correlations between the independent variables considered and an analysis of influential observations conducted. Diagnostic analyses suggest the model is robust, the goodness of fit of the model is satisfactory, and the results can be generalized. The model results are shown in Figure 5.

A model including six independent variables was able to predict overall rating of project success, with an adjusted  $R^2 = 0.68$ ,  $F = 27.81$  ( $p < 0.0001$ ).

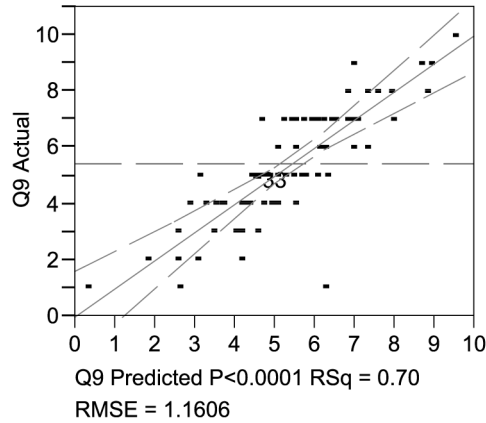


**Figure 4.**  
Successful projects

The significant variables, in order of importance, were:

- (1) the solution took into account our internal state of readiness;
- (2) the project included prototyping new solutions;
- (3) the project deliverables were clear;
- (4) the consultant partnered with the project team throughout;
- (5) the consultant was professional; and
- (6) the consultant understood our sense of urgency.

**Whole Model  
Actual by Predicted Plot**



**Summary of Fit**

|                            |          |
|----------------------------|----------|
| RSquare                    | 0.704527 |
| RSquare Adj                | 0.679201 |
| Root Mean Square Error     | 1.160558 |
| Mean of Response           | 5.454545 |
| Observations (or Sum Wgts) | 77       |

**Analysis of Variance**

| Source   | DF | Sum of Squares | Mean Square |
|----------|----|----------------|-------------|
| Model    | 6  | 224.80827      | 37.4680     |
| Error    | 70 | 94.28264       | 1.3469      |
| C. Total | 76 | 319.09091      |             |

**Parameter Estimates**

| Term  | Estimate  | Std Error | t Ratio | Prob> t |
|---|-----------|-----------|---------|---------|
| Intercept   | -2.32326  | 0.810491  | -2.87   | 0.0055  |
| The consultant was professional                   | 0.2439544 | 0.097989  | 2.49    | 0.0152  |
| Understood our sense of urgency                   | 0.1829827 | 0.076814  | 2.38    | 0.0199  |
| Project deliverables were clear                   | 0.2319746 | 0.085837  | 2.70    | 0.0086  |
| Project included prototyping                      | 0.157511  | 0.050056  | 3.15    | 0.0024  |
| Took into account our internal state of readiness | 0.2700331 | 0.077921  | 3.47    | 0.0009  |
| Partnered with the project team throughout        | 0.1585443 | 0.063651  | 2.49    | 0.0151  |

**Figure 5.**  
Model predicting rating of project success

Thus there were, in fact, substantial differences seen on most measures between projects judged “successful” and projects judged “not successful”. The last section of results examines employees’ perceptions of management consultants in general.

**Consultants in general**

The final section of the questionnaire addressed general opinions regarding management consultants in general. They were not linked to any project in particular. Again, respondents were asked to indicate the degree to which they agreed with each statement, on a ten-point scale. The results are shown in Table VII.

The first four-statements dealt with perceptions of the benefits of consultants, i.e. those purported by the industry itself such as objectivity, ideas, expertise and speed. Over half of respondents agreed with the supposition that management consultants provide objective advice, 52 percent agreed with a mean score of 6.2. Slightly more agreed that they provide new ideas, with 57 percent positive and a mean score of 6.5. Responses were less supportive of the latter two benefits, expertise and speed. Consistent with the open-ended comments listed earlier, only 39 percent of respondents feel that consultants have skills that are lacking internally (at the organization under study) with a mean score of 5.3. Some 44 percent of respondents agreed that consultants provide solutions more quickly than internal resources, with a mean score of 5.9. From the point of view of employees, there is only weak support for the benefits commonly promoted by the telecommunications industry.

| Item   | <i>n</i> | Percentage of those that agree (7-10) | Mean score |
|--|----------|---------------------------------------|------------|
| Management consultants provide objective advice  | 97       | 52                                    | 6.2        |
| Management consultants provide new ideas   | 97       | 57                                    | 6.5        |
| Management consultants provide expertise which is lacking in-house                                       | 97       | 39                                    | 5.3        |
| Management consultants are able to provide solutions more quickly than our internal resources            | 96       | 44                                    | 5.9        |
| Management consultants are less expensive than using in-house resources                                  | 97       | 7                                     | 3.0        |
| Management consultants customize their solutions to suit the telecommunications organization’s situation | 97       | 36                                    | 5.6        |
| Management consultants have the ability to create action based on their recommendations                  | 96       | 33                                    | 5.5        |
| Management consultants help to make the telecommunications organization more competitive                 | 96       | 28                                    | 5.3        |
| Management consultants improve the telecommunications organization’s performance                         | 94       | 28                                    | 5.3        |
| Management consultants improve the telecommunications organization’s capabilities                        | 94       | 24                                    | 5.2        |
| Management consultants change our organizational culture   | 94       | 24                                    | 4.6        |
| The telecommunications organization should use management consultants more often                         | 96       | 3                                     | 3.8        |
| Management consulting projects are generally well managed at the telecommunications organization         | 93       | 23                                    | 4.7        |

**Table VII.**  
Management consultants in general

Cost is another matter entirely. Only 7 percent of respondents believe that management consultants are less expensive than using in-house resources, with a mean score of 3.0. There were also several comments questioning the cost/benefit equation of using management consultants on the open-ended question on project successes. This is certainly a sore point with the organization, having just undergone another wave of “streamlining” in the first quarter of 2003.

Respondents’ impressions were generally negative toward the manner in which management consultant’s work. That is, only 36 percent agreed that management consultants customize their solutions to suit the organization, with a mean score of 5.6. This supports comments on the open-ended question, that management consultants often have a solution in mind, or use a cookie cutter approach. Also, one third agreed that management consultants have the ability to create action based upon their recommendations, with a mean score of 5.5. This is, no doubt, linked to the feedback that they are not often involved in implementing their plans, coupled with the notion that their recommendations are considered unrealistic at times.

In terms of management consultant’s impact on the organization, respondents did not perceive them as improving the telecommunications organization’s competitiveness, performance or capabilities. Only 28 percent agreed that management consultants help to make the firm more competitive with a mean score of 5.3. Results were the same for management consultants improving the performance. As for capabilities, only 24 percent agreed with a mean score of 5.2. They are not seen as changing the organization’s organizational culture, with 24 percent agreed and a mean score of 4.6.

When asked, employees unanimously agreed that management consultants should not be used more often. Only 3 percent of those surveyed agreed with this statement, with a mean score of 3.8. There was also a sense that management-consulting projects are not, in fact, well managed at the organization with only 23 percent agreeing and a mean score of 4.7.

Finally, respondents were given the opportunity to indicate what issues they feel are important to the successful use of telecommunications Management Consultants at the organization (via an open ended question). A total of 37 individuals, almost 40 percent of the sample, provided detailed comments. Recurring themes from the open-ended question were identified and are shown below:

Finally, what other issues do you feel are important to the successful use of management consultants at the organization? Comments:

- internal resources first;
- emphasize team approach; and
- governance.

The feedback was generally more balanced than originally anticipated suggesting that the organization should use internal resources first. Several individuals suggested that management consultants should only be engaged at the request of internal resources. The second theme was related, but emphasized that consulting projects should work more closely with the organization resources on projects, to leverage in-house knowledge and expertise. Several individuals stressed the importance of doing this to facilitate development of realistic solutions, and to facilitate knowledge transfer. The final theme centered on Governance. There is a sense that consulting projects are not

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managed consistently. Comments stressed greater accountability, in particular, for management consultants with systematic measurement of their projects and more clarity in roles and responsibilities. In the final section of this article, the results in the context of an ideal client-consultant engagement are discussed.

## Discussion

There are some limitations to this study. For instance, the results reflect employee's subjective perceptions of project success and outcome. No attempt was made to try to include "harder" more objective measures of project success. The study also focused primarily on "Intermediate" clients. It is possible that other client groups may have considerably different opinions. In addition, it was not possible to sample based on projects, i.e. there was no way to know the magnitude or context of which projects respondents were rating. This may have introduced some bias among respondents.

Nevertheless, it is encouraging that many of the success factors suggested in the literature, and proposed under "an ideal client-consultant engagement", were judged as present in management consulting projects at this telecommunications organization, to one degree or another.

Employee perceptions were most positive towards the professionalism of consultants, their understanding of the sense of urgency and motivation, and the efficacy of their communication. There was also evidence that employees perceive that consultant projects have strong executive support. Despite these factors, there were still mixed ratings of the impact and success of consulting projects at the organization.

Client focus, clarity of objectives, deliverables and outcomes, adaptation to client readiness, up front learning about our environment, prototyping and emphasis on incremental successes, partnership with the project team and availability of the consultants for the implementation phase were all critical to improved project outcomes. They were all more evident in projects rated as "successful" than not, and they are able to predict subjective ratings of project success.

The findings certainly suggest opportunities for improvement. The results suggest that no consistent approach is being taken with external management consultants at this telecommunications organization, which is reinforced by open-ended feedback from mid and lower level managers.

Recommendations for the organization include establishing guidelines for consulting projects including:

- a greater emphasis on clarity, internal communication and buy-in;
- insisting that consultants invest more time in learning about the telecommunications organization, its environment, capabilities and in-house strengths;
- recognition that implementation planning and execution must be part of every consulting mandate; and
- developing clearer governance procedures and establishing more consistent processes surrounding external consulting engagements.

General opinions of management consultants were mixed and somewhat negative. Employees at this organization under study do not agree with the traditional benefits of management consultants promoted by the industry. This leads to the next challenge.



The telecommunications organization may want to investigate one issue that resulted from the open-ended responses. Although not part of the original study, there was sufficient feedback to warrant investigating sensitivities surrounding internal consultancy, and possibly exploring ways to use internal consultancy as a complement to external management consultants.

Finally, the results of this study support the anecdotal and theoretical models reviewed earlier, in particular those emphasizing the importance of process issues, the client-consulting relationship and their impact on project outcome.

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