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Management Consultancies and Technology Consultancies in a Converging Market: A Knowledge Management Perspective

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Abstract: This paper looks into the consultancy processes and professional practices of management consultants and of technology consultants from a knowledge management perspective.

The process of consultancy in both cases was characterised by the following categories drawn from the analysis of interviews: boundaries, actors, process and information. The findings for each type of consultancy were synthesized into two different narratives. Considerable differences in the way they operate were identified in terms of: the definition of the context of the problem and risk assessment; negotiation through the client system and the use of language and vocabulary in the consultancy process, leading to the development of different professional discourses and different approaches to the facilitation of organisational learning

Keywords: Consultancy processes; knowledge transfer; organisational learning; professional discourses; power; Grounded Theory; narratives

1. Introduction

Consultancies provide good examples of organisations whose core aim is to manage, trade and sell knowledge – but do all consultancies do so in similar ways?

In the last five years there has been convergence in the UK consultancy market between the offerings of management consultancies and technology consultancies (Block, 2000). The management consultancies formed from the Big 5 accountancy practices (PriceWaterhouseCoopers, KPMG, Arthur Andersen, Ernst and Young, and Deloitte and Touche), had, in the past, concentrated on medium to long-term projects, turning high level strategic visioning into achievable operational goals (typically two to five years for benefits realisation). They saw that systems integration could fit into their offering, and the lower profit per unit of work was more than offset by the volume of work undertaken.

Marshall McLuhan (1969) stated 'the medium is the message'; for electronic and mobile commerce, businesses turned to the medium experts (technologists) rather than the message experts (marketeers and management consultants) for advice. With technology underpinning modern businesses, the systems integrators were asked for more long-term strategic advice, as clients recognised benefits realisation did not just come with the delivery of a system. The larger, more successful of the integrators, such as ICL, Logica, and Xansa (formerly FI Group), developed this offering and bought strategy-orientated technology consultancies (DMR, DDV, and Druid respectively), not least to counter the threat posed by the encroachment of the Big 5. The resulting homogenisation was accepted even by the management consultancy trade press, when, in 1998 technology firms were included for the first time in its annual survey figures (Abbott, 1998).

This paper is based on a study (Kirk, 2001) that started with an idea that, despite this convergence, there remained differences in approach between the two groups. General technology literature presupposes objective goals for major technology projects (Hoque, 2000) within predefined power frameworks, whereas general consultancy literature suggests a more subjective approach, with goals and success being negotiated concepts between consultant and client (Sadler, 1998). Initial interviews with both types of consultant and their clients had also suggested a difference between the two, perhaps in the type of work, or initial information gathering for that work.

2. Methodology

Grounded Theory (Glaser and Strauss, 1967) was adopted in this study, as a means to derive a framework from a qualitative study and from the analysis of data that was generated from a series of interviews.

Grounded Theory comprises explicit coding procedures, but also allows for theory development. It is to be used jointly with theoretical sampling, as a basis for collecting new data. Preliminary interviews provided some initial data for this study. Analysis of this data enabled the construction of an interview guide, which was used to generate the main data set that was then analysed.

There are four stages in Grounded Theory, and although they are listed here in a linear fashion, in practice, the process tends to be iterative (and on occasional iterations, non-sequential):

- the Constant Comparative Method of qualitative analysis: compare incidents, and apply them to categories (the open coding categories resulting from this stage are listed in Appendix 1);
- integrating categories and their properties (the axial coding categories that emerged in the study are listed in Appendix 2 and discussed in more detail in the next section);
- delimiting the theory;
- writing the theory.

Using semi-structured interview guides based around categories or themes derived from the preliminary work (through open and axial coding, Strauss and Corbin, 1990), a group of management and technology consultants, as well as some of their clients, industry analysts and recruiters, were interviewed, to show differences or similarities between the two groups.

This study used a multiple-role sampling strategy (see figure 1). This was a refined revisit to the former study strategy, again to enable data triangulation. The x-axis considered actors as either internal or external to the consulting process (again, these were clients and consultants), whereas the y-axis considered actors according to complexity of their perspective. Consultants involved with either one or other type of consultancy and external actors with a homogenous market overview (such as industry analysts and recruiters), were seen as having a single perspective. Actors with detailed experience of both types of consultancy, be that internal or external, were seen as having a dual perspective.

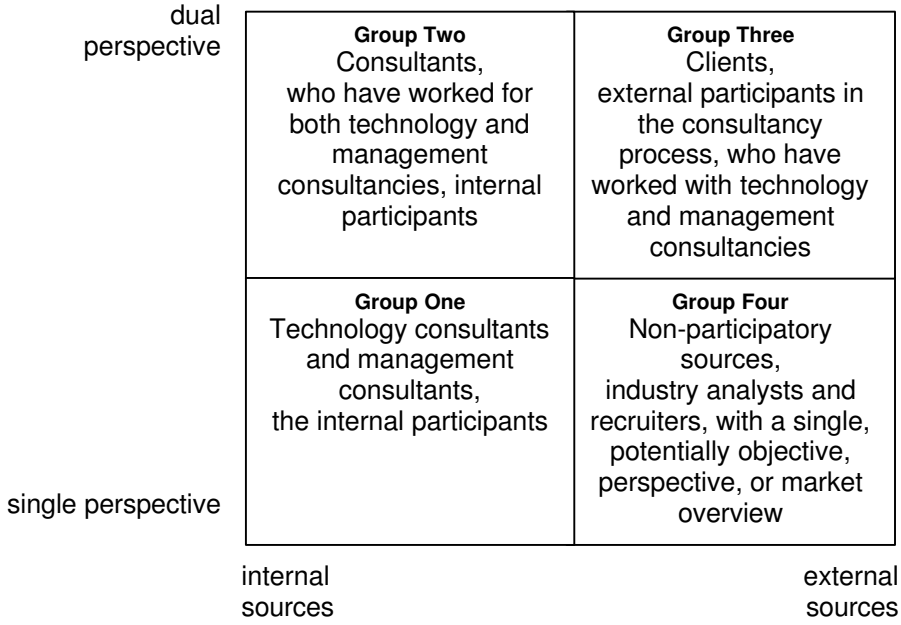

Figure 1: Sampling strategy for interviewee selection

The broad categories of data presented in Appendix 2 remained the same throughout the study, although their properties were refined extensively. Finally, the findings for each type of consultancy were synthesized into two different narratives (Czarniawska, 1998), representing the perspectives of management consultants and of technology consultants.

A narrative is more suitable for describing events in broader contexts (Czarniawska, 1998), as opposed to other presentation methods, such as a conditional path, which is useful for looking at events in specific situations (Strauss and Corbin, 1990). Given the range of contexts possible in consultancy situations, the narrative approach has been chosen for this study. The conceptualisation of the categories and their relationships to a narrative, or story line, provides the researcher with a foundation to construct a full descriptive narrative, or story, about the central phenomenon. This story may contain scenarios, made up of causal conditions (events that lead to the occurrence of a phenomenon), phenomena and consequences. The phenomena will have a context, a specific set of properties/conditions along a dimensional range. In the scenario there will also be action/ interaction strategies to manage or respond to a phenomenon.

3. Analysis of results: a framework for the process of consultancy

3.1 The main categories and their inter-relationships

The process of consultancy in both technology consultancies and management consultancies was characterised by the following categories drawn from the analysis:

- **boundaries**, related to the definition of the type of problem addressed by the consultancies, type of solutions, boundaries for success and measures of success;
- **actors**, related to the definition of the nature of the participants and of their roles and to the delimitation of competencies in the consultancy process;
- **process**, related to the determination of the nature of the consultancy process (whether it is prescriptive or emergent, for example), of the ownership of the problem and to the sources of knowledge about the process;
- **information**, related to the type of information that is used throughout the process, its sources, the degree of complexity, and its elicitation methods.

The broad categories of data that emerged have remained the same throughout the study, although their properties were refined extensively. Appendix 2 describes in detail the properties and dimensions of each category and discusses them against previous work on the nature of consultancy.

Figure 2 aims at explaining, not only the relationship of the categories, but also how these categories are involved in the generic process of consultation, whether by a technology or a management consultant. Figure 2 has been drawn in a sequential fashion, starting with 'Consultant' and using arrows to move from one actor or object to another, via an action. In practice the procedure is iterative, but a sequential notation is used here to establish strong relationships.

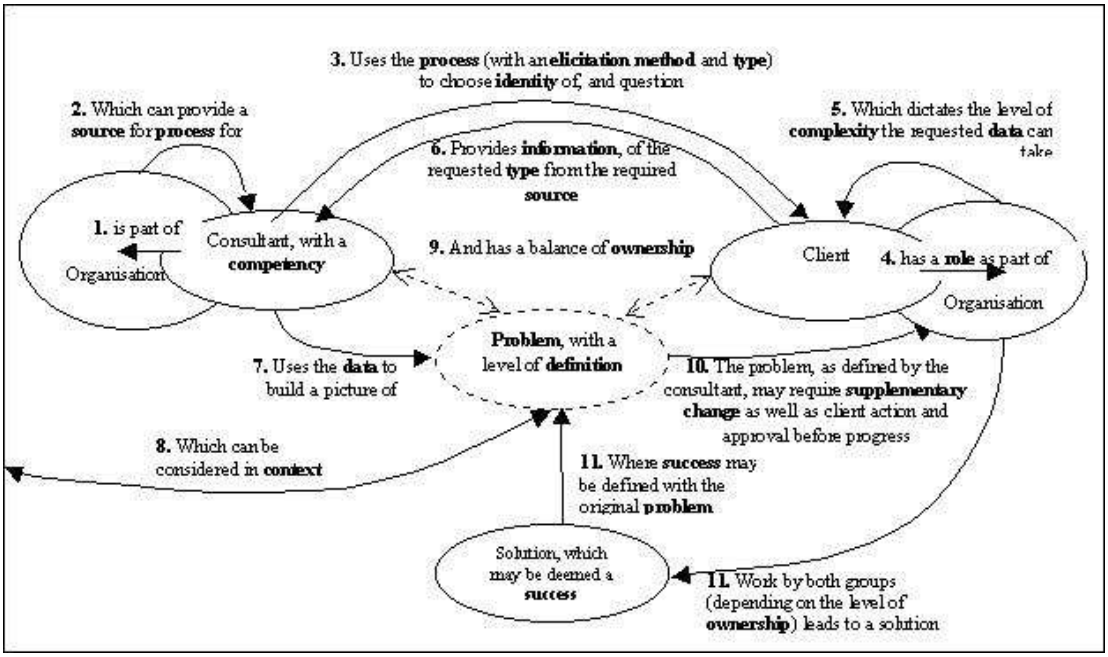

Figure 1. Relating the categories to consultation procedure and to each other

The process hinges on the consultant-client relationship and the questioning of the latter by the former to retrieve **information**. This questioning, or **process** is heavily dependent on the **competency** of the consultant and espoused paradigm for consultancy, to the extent that it shapes the **identity** of the client that is used as a source, the **elicitation method**, and the **type** of information requested and its **source**. However, prior to this interaction, it must be remembered that both parties are individuals within their respective organisations, and those organisations can influence the procedure. For the consultant, the organisation may provide a **process source** (or the consultant may be the source); for the client, the organisation dictates the **role** of that individual, and may also dictate the level of **complexity** of the information provided. The client then provides the requested type of information or information to the consultant from the required source. It is this information that allows the consultant to build a picture of the **problem**, and its **definition** is dependent on the initial information provided by the client. This process is repeated by the consultant if there is a lack of definition regarding the problem. Such probing can also define the **context** of the problem, if the consultant so chooses or if the processes used by the consultancy organisation require it. This process of building a picture of the problem also entails negotiating the **ownership** of the problem, which can lie towards the client or the consultant, or between the two. Once there is a defined problem, the consultant can then suggest ways to move towards a solution. This solution may require some **supplementary change** by the client before it is attainable. Irrespective of the supplementary change, there will be a need for approval and action by the client before a solution can be achieved. The level of client intervention is dependent on the **ownership** of the problem, but some action by both client and consultant enables work towards a solution. Depending on the definition, this solution may be considered a **success**. This definition of success will be part of the original **problem definition**.

Despite the fact that both types of consultancy could be characterised through a generic framework based upon the four categories that were identified and the presence of some similarities, the results of the study showed that there were also considerable differences in the way they operate.

Both groups concentrated on building a picture, using uncodified, qualitative interview data from numerous sources. Although both groups recognise the subjective nature of reality, the technology consultants tended to be focussed on achieving a single objective view of the problem situation, whereas the management consultants appeared to focus on negotiating potential views of the problem and especially the process that was to be undertaken. If we consider the subjective/objective ontological axis as a sliding scale, the management consultants appeared to foster a more 'pluralist' view of the consultancy problems and processes than the technology consultants.

By using the interview data, in the form of the statements, to link the categories, we can build the following narratives to represent the perspectives of both groups of consultants.

3.2 Constructing a narrative for the management consultant

"We start with the original drivers, which are broad, 'get closer to the customer', and pin it down to some performance metrics.". This 'definition' statement was common for both groups, but management consultants were keen that "You have to understand their [the client's] appetite for change" with client actors playing an important part in this process, since "Details of who sponsors the project is absolutely critical." The emphasis is on "due diligence, and risk assessment." This softer information had to be considered within the organisational context, in that they would "assess the board, assess the sponsors, who are in favour, who are against, can we win them round?" "Undertake a stakeholder analysis to see if we can sideline any people who threaten the project." Here the process is explicitly named: "There are generic processes; we first assess the readiness for change at board level, we then form focus groups to disseminate what the new way of working will mean, we then assess the organisation's readiness for change at other levels". "This shows either the homogeneity, or stratification, of belief throughout the organisation." From this description of the process, it appears a structured approach, but it is interesting that none of the steps are about gathering information relating to CRM (which was the aim of the project these last statements relate to), rather, the focus is on generic information about change, and the client referred to is a powerful client rather than

an information client. "We use qualitative analysis for testing the higher levels in the organisation, and quantitative for the final [lower level] change audit". Again there is explicit naming of activities and approaches and constant use of the personal plural, 'we'. This is part of a process "These are briefing documents [for the rest of the project], with the way they work, project history, how they fit in with respect to their industry."

The core categories can be seen as the **process type** and **process source**, since the narrative depicts the management consultants using vocabulary from the codified process source, to explain the management of a prescriptive process.

3.3 Constructing a narrative for the technology consultant

"Clients usually lack either skills or time." "You have to get the client to understand what they are trying to do", "they would have a technical person and I would take a technical person, and we discuss it that way." This suggests an approach to consulting that is biased towards the 'technical expert' role. The way to gathering information is to "create briefing materials, so the client understands the context, and topic checklist to cover," "the most productive way is to question them about the nature of the problem." This shows the emphasis on information, as compared with the concentration on role and power by the management consultants. "Consultancy is about politics and people management," and "you need executive levels of support," suggest an awareness of power boundaries; "The senior exec that sponsors the project decides who is involved full stop", but also that these power boundaries remain unchallenged. Gathering softer information is done "By devious means," "it's about knowing what's going on" (focus on using a simple vocabulary to describe situations), "it's a semi-formal process", "flexibility is the key, formal methodologies are too rigid". The following is more about the interpretation of concrete signs that are indicative of a poor political situation; "Are they quibbling over 1K on a bill? Is there a definite strategic vision to the project? That's when you know [the project is likely to fail]." The whole information gathering process revolves around interacting with clients, and the roles are understood "economic buyers, recommenders [sic], etc.", but "the most difficult thing is getting access to the right people." The concentration on a single, objective worldview is reflected by the statement, "It is about trying to understand the true situation behind the appearance." This worldview is closely tied to the technology consultants' own immediate experience, which he or she regards as complex and in some ways indefinable. This leads to a distrust of seemingly more simplistic information gathering methods, "Quantitative data analysis is too broad brush for the sort of work we do", "questionnaires tell you nothing."

The core categories here are **problem definition** and **process type**: all aspects of the narrative are focused around the definition and then emergent management process of the problem situation.

4. Converging market, different offerings

As demonstrated by the two narratives that represent the perspectives of both groups of consultants, despite the presence of some similarities in the general process of consultancy that is undertaken by both groups, there were also considerable differences in the way they operate. These similarities and differences are discussed in terms of:

- the context of the problem and risk assessment;
- negotiation through the client system: change, power and transfer of knowledge;
- the use of language and vocabulary in the consultancy process, leading to the development of different professional discourses and different approaches to the facilitation of organisational learning.

The following sections discuss these points in more detail.

4.1 Problem context and risk assessment

Whilst both groups undertake projects at a 'blue sky' stage, helping the client to define the project and the metrics for success of that project, the management consultancies have formalised and codified their risk assessment processes with respect to individuals, power and politics. This analysis helps to define the project, its context and its boundaries (Checkland and Scholes, 1999). The technology consultants also undertake stakeholder analysis, but the process seems to remain internal to the consultant and appears, therefore, to be circumscribed to specific areas of intervention of each consultant and to remain within the knowledge repertoire of each individual consultant. It does not appear to be documented and explicitly codified, which

raises questions on how learning around these issues after the event occurs.

Both groups appear to undertake what Schein (1985) refers to as 'process consulting'. Neither group is solely brought in as an expert resource (French and Bell, 1984), although the technology consultants put themselves closer to this role than the management consultants.

The technology consultants bring pre-understanding (Argyris, 1990) to situations that is based on their past professional background, but perhaps because of this tend to do less scouting (Kolb, Rubin and McIntyre, 1979) or risk assessment. They tend not to focus in considering their own position in the situation, and view the problem as isolated, lacking the extra level of reflection that Checkland and Scholes (1990) deem necessary to define context.

The management consultants attempt to define the context for the problem, and seek to define boundaries for the project, separate from the organisational boundaries, and use the influence of powerful actors within the client to aid them in this process. This risk assessment in its broadest sense, constantly considering people, power and their alignment, continues throughout the course of the project.

Context is hugely important, since it is an explicit negotiation of power, in both senses of the word. The technology consultants, by their lesser emphasis on context definition, appear to foster a tacit acceptance of client power structures.

Another important distinction lies in how contradictory information is managed. The technology consultants were less willing to consider contradictory information and present it to their client, whereas the management consultants were more comfortable in their attitude towards it. This can be interpreted in two ways.

Firstly, the Burrell and Morgan (1979) paradigms can be considered as sliding scales rather than four distinct groups, with the technology consultants, although accepting of the pluralist nature of social reality, still having a greater affinity with the functional paradigm in their modes of organisational intervention, more so at least than the management consultants. This could have roots in the historical background of the two types of consultancy, with the focus of technology consultancy lying in the delivery of precise solutions, often in the shape of a computer based system.

Secondly, we can consider the nature of the client-consultant relationship. Harris (1973) refers to child-child, parent-child and parent-parent transactions in social situations. An acceptance of contradiction and complexity in a relationship (here between consultant and client), suggests that the relationship between client-consultant, as well as their perceptions of the problem situation, may be perceived as evolving and negotiated throughout the process, whereas a view of the process of consultancy as the provision of a solution to a problem, as traditionally inherent to technology consultancies, may lead to (apparently) simpler relationships that are based on demand and satisfaction. The management consultants, with their emphasis on power and negotiation, their focus on creating an organisational discourse, and the resultant shared responsibility, have a dialogue that may allow them to explain and handle the contradictions more easily.

4.2 Negotiating through the client system: change, power and transfer of knowledge

Both groups tied their definition of success to client definition, but also to the amount of client involvement in definition, again suggesting both groups are, at some point, involved in process consultation (Schein, 1985). This view is reinforced by the belief of both groups that they are involved in work where managing change is the most important element of the work.

The two groups had different competencies, with the management consultant placing emphasis on organisational knowledge, and the technology consultants erring towards utilising specialist knowledge rather than passing it on. According to the model proposed by Schein (1985), this is a significant differentiator, since by his criteria, the management consultants remain in the 'process consultation' mould, but the technology consultants practise is indicative of the 'doctor-patient' or 'technical expert' role.

An interesting dimension in discussing this issues lies in the career background of the consultants that were interviewed. Client and recruiter interviews suggested that the technology consultants tended to come from a background of specialised professional practitioner experience, often started in industry, rather than the 'career consultant'

that typified staff from the Big 5. The continuing survival of the technology consultant was due to some inherent skill built on their professional experience, meaning that the organisation alone was not enough to make the employee a technology consultant.

The different career background of the two types of consultant could suggest that the basis for power, in each case, is built in a different way – the technology consultant relying on expert knowledge and the management consultant on organisational intervention and negotiation skills.

Results from this study confirmed the technology/professional and management/career consultant split, with one notable exception, Interviewee A, who had been recruited to a Big 5 practice from a technology consultancy. Recruitment for the Big 5 has previously taken place essentially from other Big 5 practices, or from other organisations at a very junior or very senior level (Interviewee L, recruitment consultant). The appointment of an intermediate level consultant from a technology firm (such as Interviewee A), with no client following, would have been very unlikely a few years ago (Interviewee L, recruitment consultant), suggesting at least a recognition of convergence and a tacit acceptance that other types of consultants, can fit with management consultant processes and language.

Further differences emerge when considering the Lippit and Lippit (1984) client system. The technology consultants concentrated heavily on the target (those that are the focus of process) and benefit (those who will benefit from the efforts of others) clients, whilst the management consultants focused their efforts on leverage (those who can make or break the process) clients, almost to the exclusion of other parties. This is an important difference, since by courting powerful individuals in the client organisation the management consultants are more able to affect change. The concentration on benefit and target clients by the technology consultants amounts to an avoidance of leverage clients, which in itself is tacit acceptance of the client organisation power structures. Again, this puts the management consultants in the change pole and the technology consultants in the order pole in the Hirscheim and Klein (1989) model of organisational intervention (based on Burrell and Morgan, 1979).

The management consultants were far more prescriptive in their processes than the technology consultants. For the technology consultants, this emergent approach (where the process is driven by mental checklists or the memory of a similar project), along with the pre-understanding in defining the problem provided by their original professional background, suggested that the individual consultant is the main owner of the process. For the management consultants, the process is more driven by their organisation, in the form of process literature and models that are deployed.

If we refer to the i-space model by Boisot (1998) the technology consultant approach (especially in the areas of risk assessment and client negotiation) appears to be working closer to the non-codified, undiffused, and concrete information (i.e., specific to particular situations) axis. The management consultant approach is codified, diffused throughout the organisation, and abstract (in the sense of being led by processes that are generally applicable across different projects).

These different processes of intervention in the organisation and of negotiation within the client system lead to the creation of different organisational locales, as arenas (Strauss et al., 1981) for the consultancy process.

The management consultancy approach, whose focus is on process, tends to aim at developing an organisation wide arena, where the collation and distribution of client project information is centrally controlled and there is an attempt to generate an organisationally accepted view of what the project is and where it is going, through the creation of different focus groups (smaller localised arenas) across the organisation that are dependent of the control of the centre.

The technology consultancy, whose focus is on the problem definition, tends to focus, once the problem is defined, on specialist areas that address the different components of the problem and form specific arenas where knowledge seems to be contained and there appears to be a more limited integration of information and process and cross-fertilization of knowledge across the various arenas.

The way these arenas are formed and function is further reinforced by the role of language and the development of interpretative repertoires, as discussed in the following section.

4.3 Language, discourse and organisational learning

The above sections raise issues of knowledge management within the two different modes of intervention that seem to characterise the two types of consultancy. Language and discourse seem to have an important role in the process of knowledge transfer and approaches to organisational learning.

The codification (Boisot, 1998) of the risk assessment process by the management consultants encourages the development of explicit naming and labelling, so that the group has a sophisticated shared vocabulary with which to discuss and dissect client situations *(ex: "we first assess the readiness for change at board level, we then form focus groups to disseminate what the new way of working will mean, we then assess the organisation's readiness for change at other levels*.". "*This shows either the homogeneity, or stratification, of belief throughout the organisation"*(Interviewee C, management consultant).

This vocabulary is incorporated in a discourse, composed of multiple constructions, each describing individual dimensions of a situation. The common organisational vocabulary lets management consultants describe their tasks in a way that allows definition, understanding, and abstraction, which makes possible their explanation to an individual who has not experienced that situation. This discourse could be therefore seen as serving to aid socialisation (Chomsky, 1986) and learning within their organisations and amongst client organisations, and hence support knowledge management practices in the consultancy process (Nonaka and Konno, 1998).

The discourse of the technology consultants was based upon single phrases that were used to cover very complex situations (ex: *"it's about knowing what's going on*", Interviewee F, management consultant), reflecting the tacitness of the understanding of this situation by the individual consultant. This discourse did not appear to be immediately geared towards supporting group sharing or learning both within the consulting organisation and between the consultancy and its clients. Most of the stakeholder analysis and risk assessment that was also carried out by the technology consultant appeared to remain bounded to the specific areas of intervention of each individual consultant and remained largely tacit. This may relate to the traditional career background of the technologist as a subject expert focused on specific areas of intervention, hence possibly more individually or small team oriented. However, whether this completely undermines organisational learning can be questionable.

What seems clearer is that there are different organisational practices amongst the two groups in relationship to knowledge sharing and organisational learning and that the development of professional discourses plays an important role in that.

Another view on this issue relates to how power relations can be reproduced in different ways through discourses (Foucault, 1971, 1972; Hackley, 2000). The focus on the development of a shared discourse (Strauss et al., 1981) and a shared interpretative repertoire (Hackley, 2000) may be a vehicle for reproducing ways to control events and situations, of establishing '*the right way to do things*'. This theme is explored by Hackley (2000: 246) in the context of another type of knowledge intensive organisation, the advertising agency: "*Assimilate the right discourses in the right way (such as the 'corporate way' or the 'strategic imperative') and a credible professional identity could be constructed through momentary authoritative expressions of them*".

We propose that an important way to **manage the knowledge base within consultancy organisations**, involves developing **organisational vocabularies and professional discourses** (Strauss et al. 1981) supported by **interpretative repertoires** (Hackley, 2000) that are shared within the consultancy and with the client organisations. The representatives of each type of consultancy in this study seem to have different practices in developing and, most of all, in situating their discourses in the undertaking of the process of consultancy.

Whereas the management consultants that took part in this study referred to the explicit development of these discourses as an integral part of the consultancy process, aiming at the use of a common language as a vehicle for generating common understandings of the process with the client system, the technology consultants seemed to focus on problem definition and problem boundaries and to foster a more tacitly oriented view of the process and of the client system that is represented through a simpler vocabulary.

5. Conclusion

This study had a focus on finding out whether there are process differences between the professional practices of management consultants and technology consultants in a converging market.

Analysis has shown that despite similarities that could be represented in a generic model for consultancy, there were also significant differences between the two groups of consultants. Whilst both undertake similar work (undefined 'blue sky' projects) and use similar techniques to ensure success (sharing ownership with the client with varying degrees), the management consultants have formalised and codified their risk assessment processes with respect to individuals, power negotiation and politics. This analysis, and subsequent power mapping, gives the management consultants greater confidence when trying to leverage the client into accepting change. Their approach is oriented towards defining the process of consultancy itself and negotiating its acceptance, by courting powerful stakeholders (leverage clients) that may influence the results of the project, constantly considering people, power, and their alignment.

The technology consultants also undertake stakeholder analysis, but the process is an internal one by the consultant. This localises the analysis to specific areas of the consulting organisation and the resulting knowledge appears largely not formally documented. Their approach is oriented towards defining the problem to be addressed and its boundaries. The existence of key stakeholders is acknowledged, but there is no attempt to influence their power basis. Instead, they appear to concentrate on target and benefit clients whose role is focused on information provision.

These different processes of intervention in the organisation and of negotiation within the client system lead to the creation of different organisational locales, as arenas (Strauss et al., 1981) for the consultancy process.

Language, through the development of professional discourses, appears to play an important role in the management of the knowledge base regarding projects and in the enabling of organisational learning within consultancy organisations. The management consultants and technology consultants have different practices regarding the development of these discourses and in situating them in the process of consultancy.

The situation of these discourses in '*the play between powers*' (Alvesson and Skoldberg, 2000, p.229), within the consultancy process, leads to different patterns of negotiation through the client system. These different processes of negotiation relate in turn to different understandings of the nature of the consultancy process and of the rules that guide it and, ultimately, to the creation of different organisational locales, as arenas (Strauss et al., 1981) for the consultancy process.

These different locales or arenas can coexist in the same organisation and in the same consultancy project, without necessarily undermining each other or clashing with each other, as exemplified by the coexistence of different types of consultancies and consultants within large projects, where the various professional groups claim expertise in different areas of concern.

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APPENDIX 1

Open coding categories

Independence (clarity of thought), dimensions:
High independence, high value, high creativity, to low independence, low value, low creativity

Independence (difficulty to work with), dimensions:
High independence, high degree of cultural change/low culture fit, to low independence, high degree of cultural fit/low degree of culture change

Cultural fit /integration, dimensions:
High to Low

Type of problem, dimensions:
Define, or undefined

Type of behaviour approaching that problem, dimensions:
Proscriptive model, to emergent model

Awareness of process, dimensions:
Awareness of use of proscriptive model, or no awareness

Explicit stating/coding of process, dimensions:
Stated/coded, to unstated/uncoded

Type of solution/extent of solution, dimensions:
Tightly defined solution, to lack of definition, high potential degree of change

Ownership of problem, dimensions:
Consultant, to client

Process, dimensions:
Technical expert, consultant ownership, to organisational learning, dual ownership

Extent of change/uncertainty, dimensions:
Tightly defined solution, to lack of definition, high potential degree of change

Boundaries for success, dimensions:
Tightly defined solution, to lack of definition, high potential degree of change

Measures of success, dimensions:

Tightly defined solution: solution with minimal cultural upheaval/change, to lack of definition: solution, with the process of discovery and reason for a solution

APPENDIX 2

Axial categories

Category: Boundaries

Subcategories:

Problem. Dimensions: defined or undefined

Are projects (pre)defined mainly by the client, prior to the consultants starting, or by the consultants on entry, or as part of the entry process? This category is similar to the boundary negotiation for different types of consultancy proposed by Schein (1985), where a problem can be defined (as occurs in the 'purchase of expertise' model of consultancy) and

undefined (as occurs in the 'process consultation' model). These are two (extremes) of the three models suggested by Schein, the third, 'doctor-patient', lying somewhere between the first two.

Defined, sample statement: "*Sometimes [the client] doesn't get you involved until the work is commissioned*" (interviewee G, technology consultant)

Undefined, sample statement: "*Start with the original drivers, which are broad (eg 'get closer to the customers'), then transform that into some SMART deliverables*," (interviewee C, management consultant)

C*ontext.* Dimensions: attempt to define or do not attempt to define

Does the consultant attempt to define the context of the problem, and the political or sociological settings for it, or does he/she tacitly accept the client context? Hirscheim and Klein (1989) suggest the radical humanist and critical theorist roles for those consultants who do not tacitly accept the client boundaries, and the interpretative and functionalist for those consultants who do. This category also had some relation to the work of Checkland and Scholes (1990), with their emphasis on project context and boundary. As discussed previously, Kolb, Rubin and McIntyre (1979) suggest all consultancies have certain elements, 'scouting' being one of these. Did both types of consultancy undertake the same amount of 'scouting' to define a situation?

Attempt to define, sample statement: "*Have to understand their appetite for change and set that against their level of ambition*." (Interviewee C, management consultant)

Don't attempt to define, sample statement: "*At [technology consultancy] they are keener to get on and do the deal, they are more sales led. At [management consultancy] they are hot on making sure the deal is well crafted*" (interviewee A, technology turned management consultant)

S*uccess*. Dimensions: systems-oriented or change-oriented

This category aims to emphasise whether the measures of success are based around the technology (a system has been delivered, it works, this is the saving), or based around the original need that led to the solution. Questions were directed at interviewees in an area of consultancy (Customer Relationship Management (CRM) and eCRM) that *could* lead to technological solutions, but need not necessarily do so. How did the consultant recognise how the goals were defined? Change-oriented consultancy suggests more complexity, and subjectivity. The most subjective stance is that what is successful is what is successful for the client. The most objective is systems implementation orientated. Was there a link between a lack of client definition, and systems implementation for the technology consultants? The category is an extension of the 'task' and 'responsibility' areas for the types of consultancy proposed by Schein (1985).

Systems-oriented sample statement: *"What are you there for? Is it a new product for existing technology? A new product with new technology, a new product because of new technology, or is there technology in place that is suitable?"* (Interviewee G, technology consultant)

Change-oriented sample statement: "*any consultancy work is mostly about change management, and the issues surrounding this area. Whatever you are doing you have to keep this in mind*" (interviewee E, management consultant)

S*upplementary change for project delivery*. Dimensions: included in project remit, or excluded from project remit.

This is linked to success, and the definition of the project. Is the change necessary for delivery and benefits realisation, intrinsic to the project for both groups of consultants? This category is an amalgamation of themes, again from Hirscheim and Klein (1989), with the category extremes taken from their desire for radical change/ desire for order and regulation axis, but it also draws on the work of Schein (1985), and his models of consultancy. Schein suggests task boundaries as specific or resolution and learning-orientated. A correlation between resolution/learning

orientation, and radical change, and also between project specific work, and order and regulation was identified during the interviews. Both consultant groups are engaged in work that *could* lead to ISD projects; does either group define the task solely according to the system task?

Included in project remit, sample statement: "*The change isn't always recognised right at the start, whatever happens, you have to identify the organisational change requirements, and decide who is going to deal with what*" (interviewee F, technology consultant)

Excluded from project remit, sample statement: "*if you need change, you need a change management team in the client as well*" (interviewee A, management consultant)

Category: Actors

Subcategories

Consultant competency. Dimensions: knowledge orientated or transfer of knowledge orientated

Does the subject response indicate they are holders of specialist knowledge, or geared towards organisational learning? This is a straightforward comparison to Schein's models of consulting (1985).

Knowledge orientated, sample statement: *"With any SI, it is straightforward technical expertise/expert resource*" (interviewee A, technology turned management consultant)

Transfer of knowledge orientated, sample statement: "*Also look at other significant change projects in that business, see where the project is or has been hurting, how it has been happening, and key people who have already learnt lessons from working in that area, bring them on or learn from them*" (interviewee A, technology turned management consultant)

C*lient identity*. Dimensions, target client, or leverage client

The aim was to see if interviewees made a distinction between the different types of client, and to see if either had a bias towards which they gained information from. These correspond to work by Lippit and Lippet (1984), and the different actors in a client system. The author felt the two most relevant roles are target client and leverage client, since a bias towards dealing with the target client is more politically naïve than concentration on the leverage client.

Target client, sample statement: "*You expect a single sponsor or owner, and if not there is a problem*" (interviewee F, technology consultant)

Leverage client, sample statement: "*Need to understand the roles, economic buyers, recommenders, stakeholder analysis, different roles*" (interviewee F, technology consultant)

C*lient role.* Dimensions: informative or powerful

When the consultant talked of clients, how did they describe them? Did they distinguish between the two roles, and whom did they try to deal with? This is different from the client identity, since both client roles can be found in each identity. This category also considers the work by Lippit and Lippit (1984), but in the context of work by Burrell and Morgan, in that to affect radical change, there must be the involvement of powerful actors, as opposed to informative actors who would merely aid work within existing boundaries.

Informative, sample statement: "*Need to find trusted sources, not higher up individuals, and then try and validate or verify that data*" (interviewee B, management consultant)

Powerful, sample statement: "*Then see if we are able to sideline opposition, or if we can't, we get that person involved, try and present the business case to them, essentially give them special attention to win them round*" (interviewee C, management consultant)

Category: Process

Subcategory

Process type. Dimensions: prescriptive or emergent

Was either group more prescriptive, and if so, how so, and in what area of information gathering? Did this seem to make a difference? This category is taken, indirectly, from the work of Boisot (1998), and is connected to the *codified/uncodified information* subcategory. If the knowledge about process lies with the organisation, does

this necessarily make the process more presciptive? If the process is 'owned' by the consultant, does it appear more emergent?

Prescriptive, sample statement: "*There is a generic process in which we look at what needs to be achieved and what tasks are required to achieve that, inputs and outputs, where the output could be creating a mindset in a client group*" (interviewee C, management consultant)

Emergent, sample statement: "*There are too many things that depend on the culture of the organisation for it ever to be prescriptive*" (interviewee G, technology consultant)

Ownership. Dimensions: consultant-owned or client-shared

Was there a bias towards more consultant owned projects for the technologists? This category is taken from work by Schein (1985).

Consultant-owned, sample statement: "*The difficult thing is getting to speak to the right people for the right amount of time*" (interviewee G, technology consultant)

Client-shared, sample statement: "*All successful projects tend to be joint efforts between the consultant and client. You need to work together on these things*" (interviewee F, technology consultant)

Process source. Dimensions: codified or uncodified

What guides the process method? Is it written down, or is it internalised? This category is taken from the work of Boisot (1998). Where does the knowledge about process lie, who is the owner? Is it codified, and 'owned' by the organisation, or is it uncodified, and 'owned' by the consultant.

Codified, sample statement: "*For predefined sets of work you tend to use frameworks, balanced scorecard and the like, with clients too, run through models with them, so they can see the value*" (interviewee A, technology turned management consultant)

Uncodified, sample statement: "*It is a semi formal process, yes it is formal but it is internalised, so that it becomes natural without checking boxes, but yes, it must be done*" (interviewee B, management consultant)

Category: Information

Subcategory

Source. Dimensions: codified or uncodified

What type of information is gathered, and where is it gathered from? This category is similar to the subcategory of *process source,* again based on the work of Boisot (1998), but this time applied to the knowledge of the client organisation. Is there a concentration on one or other type of information? Where does the knowledge about client organisation lie, and who is the owner? Is it codified, and 'owned' by the client organisation, or is it uncodified, and 'owned' by the client employees.

Codified, sample statement: *"[When you start], any work done by any other consultancy is helpful, even if apparently unrelated"* (interviewee C, management consultant)

Uncodified, sample statement: "*you don't necessarily know what you need or whether another person already has it, [until you speak to them]. Each project depends on the issues associated with it. The atmosphere of your data gathering is very different for a [sic] [each]project, which may cause downsizing by 50%*" (interviewee G, technology consultant)

Type. Dimensions: objective or subjective

Given that the questions revolve around information gathering, is there any difference in how the two groups treat, or concentrate on, different types or sources? This category corresponds to work by Burrell and Morgan (1979), given the objective/subjective axis to their model, but here it is applied to information. The application, as with source, depends on ownership of information, but the favouring of one or other of the information types suggest a judgment on the part of the consultant, that corresponds directly to either the objective or subjective end of the Burrell and Morgan axis.

Objective, sample statement: "*Difficult to understand the real, true situation*

behind the appearance" (interviewee E, management consultant)

Subjective, sample statement: "*Where the organisation believes it is, as opposed to where it actually is*" (interviewee E, management consultant)

Complexity. Dimensions: complementary or contradictory

How do the different groups treat contradictory information? How do they cope with it? Do they treat it differently? The ability to cope with contradictory information is indicative of complex and mature approach. The two extremes relate the consultant-client relationship to the transactional analysis parent-child or parent-parent relationships, the former, simplistic, with black and white definition, the latter, complex, with room for grey areas. There is also the influence of the Burrell and Morgan (1979) objective/ subjective axis, with the concentration on complementary information suggesting a simplistic approach favouring a single 'organisational' viewpoint. The contradictory information suggests a more pluralistic method, taking account of the different actors that make up the client.

Contradictory, sample statement: "*it will show a lack of homogeneity of belief through the organisation, perhaps some stratification*" (interviewee C, management consultant)

Complementary, sample statement: "*Look at both sources, which is the most reliable? Have to present both sides to the sponsor, but you don't want that, its better to have a single argument*" (interviewee G, technology consultant)

Elicitation method. Dimensions: qualitative or quantitative

Do the different groups favour, or concentrate on, different methods to elicit this information? Kuhn (1961) suggests the quantitative approach favours a positivist paradigm. Does either group favour this paradigm, or is there more of a pluralist, qualitative paradigm?

Qualitative, sample statement: "*No questionnaires or quantitative analysis, as this is too broad brush for the sort of work that we do*" (interviewee D, technology consultant)

Quantitative, sample statement: "*look at analysis of existing customer data, have they got that customer data, what is the business problem, who are the customers, that's how to work it out*" (interviewee F, technology consultant)

