

**Professional purchasing provides professional projects and removes personal bias. Doesn't it?**

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Professional purchasing provides professional projects and removes personal bias. Doesn't it?

Gone are the days when management consultancy projects were arranged due to friendship and networks, based on relationships between a board member and a consultant. Management Consultancy firms have themselves diluted high-personalisation by adopting a policy of commoditisation and workforce leverage in their quest for optimising profitability. Clients have diluted the one-to-one nature of buying by professionalising purchasing practices. Consulting firms nonetheless invest in relationship managers in the belief they rely on these strong relationships for their future business. Using semi-structured interviews to collect data on buyers' triggers, validation, decision-making and selection processes, the research presented in this paper explores the changes in purchasing practices and examines what they mean with regard to what clients see as successful relationships between consultants and their clients.

## Introduction

Management Consultancy is a complex multi-actor professional service system which arguably is bought, not sold, and has high customer voluntary participation (Ostrom et al., 2015; Susskind and Susskind, 2017; Matthias, 2018). The engagement of consultants used to be a personal, relationship-driven matter where networking and social ties were paramount, and much has been written on the importance of relationship-building to management consultants, and on how it is the cornerstone of growth for firms (Ernst and Kieser, 2000; Maister et al., 2000; Handley et al., 2007; Chelliah, 2011; Fischer et al., 2014; Empson et al., 2015).

However, over the last few decades client organisations have formalised their purchasing practices and this has had an impact on how consultants are engaged. The personal has ostensibly been removed and process has become paramount. There is less empirical research when it comes to the client perspective on the client:consultant relationship in the context of the professional buying of consulting services. Using

evidence obtained through interviews with major consultancy buyers, this paper presents findings regarding how organisations engage consultants and what criteria are instrumental in their choice of consulting partner. These insights can be used by consulting firms to improve their responsiveness to clients, raising awareness of how to more directly customise their service.

The fact that personal relationships are no longer central to buying but are central to working together is a complicating factor for consultant and client alike (O'Mahoney and Markham, 2013). Unlike other B2B professional services, the design, selection and delivery of the still discretionary consulting service usually takes place over an extended period of time, with a multi-actor client actively co-creating the value they will eventually buy (Ostrom et al., 2015; Matthias, 2018). The final outcome for each project is based on the nature of the relationship the client seeks for that particular intervention and how the client wishes to work with the consultant to achieve that (Broschak, 2015). With the formalisation and professionalisation of the buying process it is important for consultants to understand why and how buyers choose with whom they work. To try unpick some of the complexities surrounding the nature of buying consultancy services and to help consultants understand how and where they can influence the process, the research questions are:

RQ1 How are consultancy services purchased?

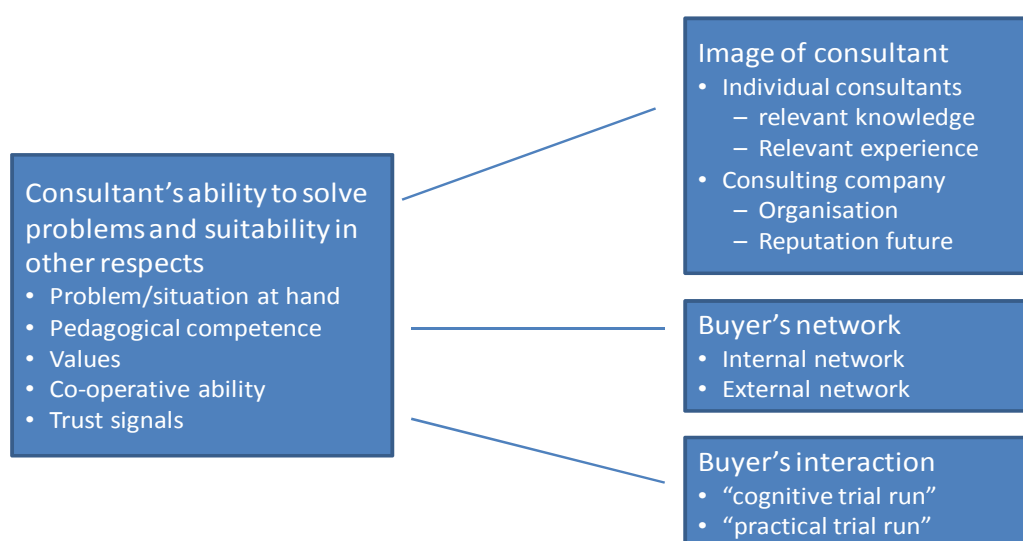
RQ2 What matters to clients as they buy consultancy services?

Primary data was collected through interviews with senior executives from British, German, Chinese and US utility firms. The interviews explored the consultant

engagement process seeking to identify key influencing features. A mix of functional, mechanic and humanic factors (Berry et al., 2006), both positive and negative, emerged from the responses, incorporating process and emotional perceptions of participants. Whilst the differences were interesting, it is the similarities which were focused on in order to seek insights. This is situated within existing research from both a buying and selling perspective which highlights the multi-layered complexities involved in creating and delivering management consulting services.

## Buying consulting services

Consultancy is a high product complexity, intensely interpersonal, multi-actor purchase bought for a variety of reasons (Matthias, 2018). As such, there is potential for multiple interpretations of service quality, with multiple influences on expectations, experiences and interaction with consultants both before and after engagement. Figure 1 shows how these mostly intangible factors combine to influence a client's a priori evaluation of consultants (Edvardsson, 1990; Lowendahl et al., 2001).



**Figure 1: Factors Influencing the Buyer's Evaluation of Consultants (Edvardsson, 1990)**

These factors chime with the functional, mechanic and humanic clues Berry et al. (2006) noted and underline how both rational and emotional perceptions of service quality influence decision-making. Much boils down to reputation, obtained through the buyer's network, and is a prior assessment of the abilities of an organisation, unlike 'satisfaction' which is a post-experience judgement (Flanagan et al., 2005). Instrumental in the creation and sustaining of a relationship, such concepts underpin the reliance on 'soft' judgemental criteria when selecting consultants (Werr and Perner, 2007; Hill et al., 2009; Höner and Mohe, 2009). Clients have a presumption that technical competence exists so look for social competence through empathy and genuine interest to be able to co-create a shared reality (Stumpf and Longman, 2000; Schwarz, 2004; Appelbaum and Steed, 2005; Richter and Schmidt, 2006; Chelliah, 2011; Giannakis, 2011).

As consulting is such an expensive purchase, in order to formalise and bring into line with the procurement of other services, organisations moved away from personal contracting for consultancy support to a more organisation-wide approach involving professional purchasing staff and managers who would be instrumental in shaping the requirements and be working with the consultants on any actual project. This move was partly driven by US legislation in the immediate post-Enron environment, which required open competition. It consequently institutionalised the formal, structured procurement processes most buying organisations now practice in the US and Europe (Currall and Epstein, 2003; Deakin and Konzelmann, 2003; Healy and Palepu, 2003). It was also driven by the desire for greater scrutiny and better corporate governance.

## Selling consulting services

Consultants wish to establish long-term relationships and gain repeat business (Patterson, 2000). To fulfil this objective they recognise that no client is standard, that there are a number of client types and client relationships (Maister et al., 2000; O'Mahoney and Markham, 2013; Perner and Werr, 2013; Broschak, 2015). These authors highlight the unstable characteristics of consulting service and argue that client uncertainties should be viewed as a central aspect of the complex interplay between consultants, individual managers and their organisational context. In so doing they also therefore depict that relationship as uniquely individual, requiring focused effort on understanding the real client need and being able to add value to that.

By contrast, the industry itself has increasingly codified its knowledge and thereby moved towards ever more commoditisation for delivery of its services (Czerniawska, 2003; DeLong et al., 2007; O'Mahoney and Markham, 2013; Scott and Matthias, 2018). There are several reasons for this, not least of which is the pursuit of profitability. Commoditisation enables the conversion of corporate knowledge into saleable and usable form, in contrast to a personalised approach which is heavily dependent on individuals and relationships (Hansen et al., 1999; Muzio et al., 2010); higher consultant utilisation, through the practice of 'leveraging', where more expensive consultants oversee a greater number of younger ones (Kipping, 2002; Maister, 2003; DeLong et al., 2007); greater flexibility to respond to clients, to help mitigate against the threat of substitutes (Marketline, 2018). Less positively, whilst spreading knowledge more widely commoditisation simultaneously dilutes personal relationships; increased utilisation levels

means constraints in the time for training, reflection, creativity and innovation, all of which are necessary for building more customised client solutions and developing the trusted advisor relationship (Adams and Zanzi, 2005; O'Mahoney, 2007).

Nevertheless, despite internal operational demands, most large firms have developed systems of relationship managers, responsible for the firm's total relationship with each key client organisation. In practice a relationship manager has an internal not a client-driven focus since their primary responsibility is for managing and growing an account, and co-ordinating the consultants across every project. This seems to go against the spirit if not the letter of growing a relationship.

Central to building relationships are curiosity, questioning, an enquiring mind and interpersonal skills, which require common ground and a common language between consultant and client (Maister et al., 2000; Dowling, 2009; Mohe and Seidl, 2011). Much of this depends heavily on interpersonal psychology rather than the content expertise and technical mastery most consulting firms breed (Maister et al., 2000), possibly because they are measurable and quantifiable, unlike 'experience' and 'relationships'.

From these two seemingly opposing standpoints, this research seeks to ascertain what changes in client:consulting relationships have occurred since the professionalisation of consulting procurement and if indeed the nature of projects have changed.

## Research Method

A semi-structured interview was composed and individuals were approached from UK,

German, and US companies. There were seven utilities, six financial services companies, one telecommunications company and one international high end agency. A preliminary search on Linked In identified individuals in procurement. The UK companies were called directly and generally the call was put through to the individual requested. Success was mixed; some said no, others transferred me to colleagues they believed to be open towards researchers, or a central department that may help source participants. Some actually said yes they would participate and would pass me to colleagues or people in their networks, which is how participation became internationalised. In total, 20 procurement professionals and 40 senior executives involved in the commissioning and purchasing of consultancy services participated. All were asked the same questions regarding their organisation's procurement process.

The questions covered the following areas: what they looked for and expected from their consultants, and how they decided who they would work with. Individuals were anonymised by company although a note of role was made in case a difference emerged between procurement professional and 'the business'. Interviews lasted between 45 and 90 minutes, were recorded and transcribed once all had been completed. Data analysis was carried out using NVivo software for capture and coding.

Analysis was descriptive, identifying the steps in the process as well as thematic, grouping opinions, thoughts, feelings and ideas as they emerged.

## Findings

The findings presented reflect the thematic structure of the interview protocol and capture both tangible and intangible features important to organisations when they buy consulting

services.

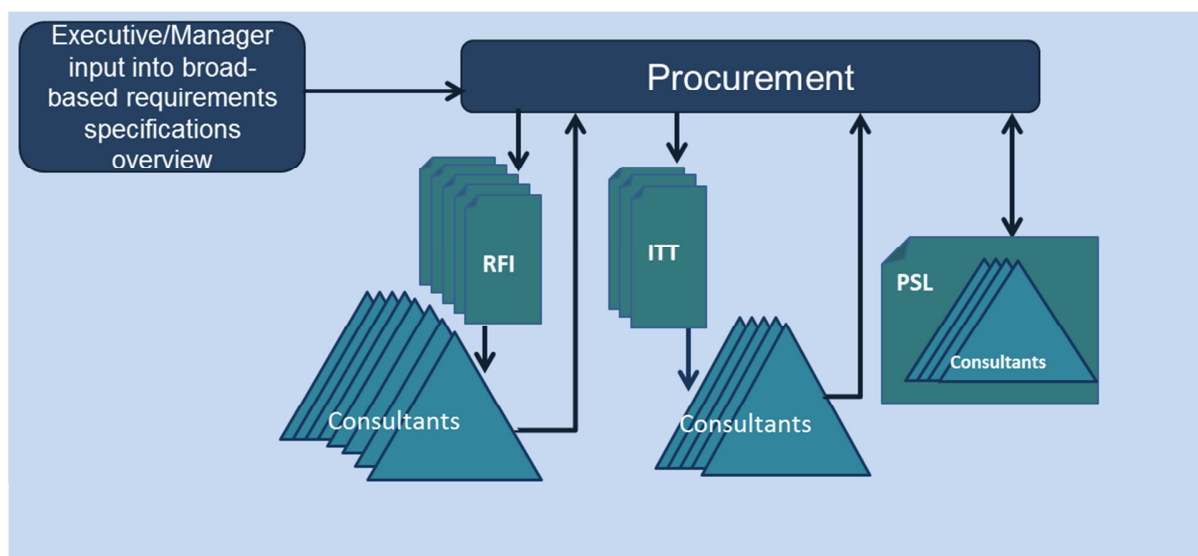
### **The consultant procurement process**

The official procurement of consulting follows a pre-ordained process for all the participating companies, and generally has two stages. The first stage is mechanical, complying with legal requirements as set by the European Procurement Directive, and is required for all projects over specific thresholds<sup>1</sup>. Whilst these requirements apply only to public bodies, private sector companies also broadly follow the same process, with initial selection for preferred supplier list (PSL) based on criteria such as worked together successfully before, reputation or recommendation.

Core business and procurement work closely together from inception in a process that is both mechanical and time-consuming. Thankfully, the Framework Agreement which results from the approach shown in Figure 2 is procured on a fixed planning cycle of 3-5 years. The preparation of a general requirement leads to a request for information (RFI) sent to consulting firms, or advertised on designated sites. Those consulting firms who are not deterred by the time and expense respond with the requisite information, which is sifted through and those who are deemed potentially suitable are invited to submit a tender (ITT). From the full responses a preferred supplier list (PSL) is created, providing a pool of pre-qualified suppliers with a broad set of skills available at an already agreed rate.

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<sup>1</sup> <https://www.ojeu.eu/thresholds.aspx>



**Figure 2: The Framework Development Process**

Of course, being a preferred supplier does not of itself guarantee fees, but being on the PSL does provide opportunities to bid for future projects.

The second stage is the actual buying (Figure 3), which begins with an internal management discussion, is opened up to procurement for:

*"broader organisational knowledge rather than just issue-specific knowledge" (Participant 17)*

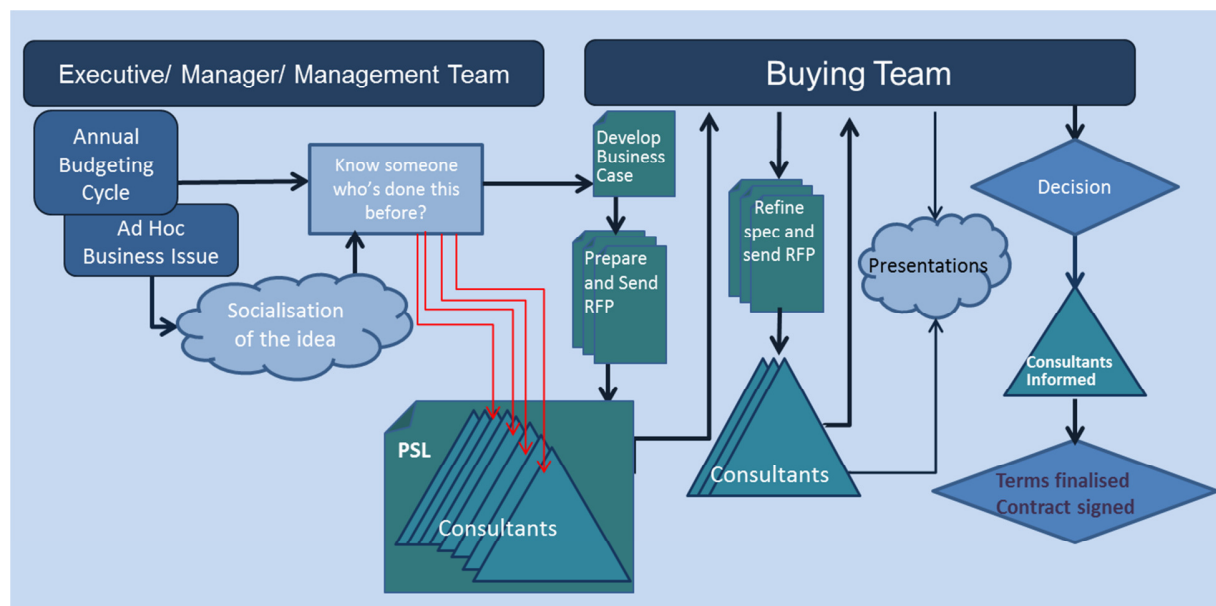
From this an initial document is sent to companies identified as being able to help in the particular area asking for suggested outline proposals. Typically, the information in these proposals is used to shape a more defined requirements document which is then sent to all or some of the original respondents, but usually no more than 3 or 4 consultancies.

Procurement's core role is seen predominantly as being to support the activity, to help source, negotiate, and contract. There is little, if any, difference between the companies.

The steps are briskly listed by one respondent:

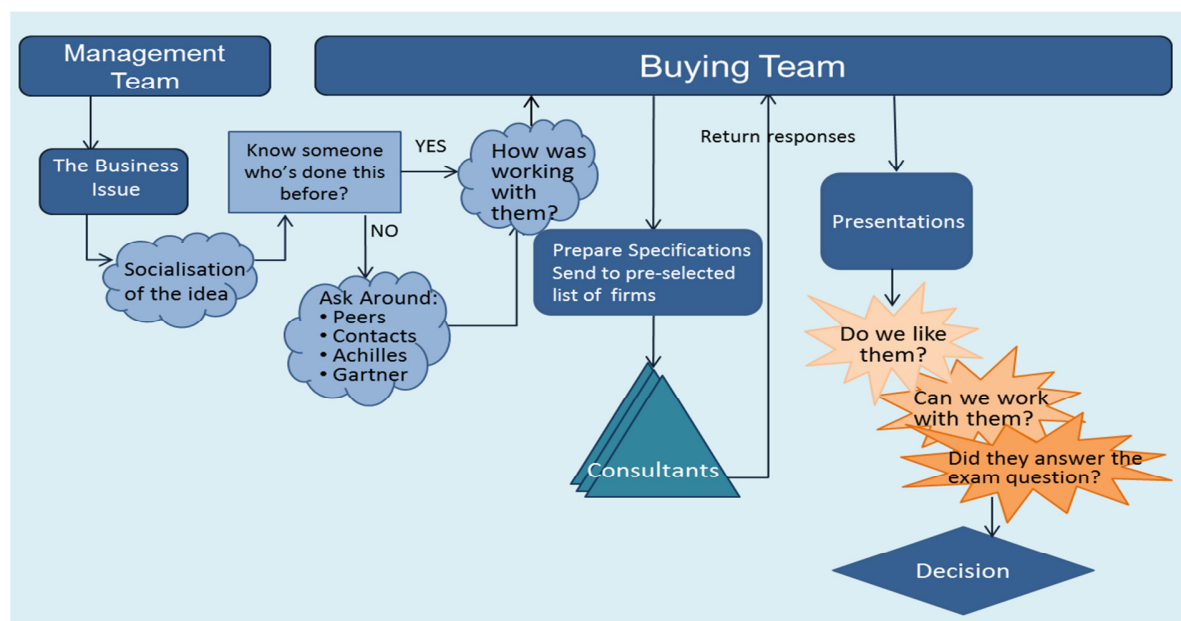
*"Specification out, briefings, follow-up briefings for those that want them during the course of preparing their pitch, and when they do the pitch, we'll score it and weight it and make the*

*decision with that bid review team". (Participant 39)*



**Figure 3: The Buying Process**

From receipt of proposals to the decision being made, organisations use a scoring sheet which has a set number of scoring criteria, weighted dependent on the particular assignment. Participants admitted they weight the criteria for consultants on qualitative factors. This was a key area where companies differed. For instance one company weights 70% on the technical side, whose sub-criteria include cultural fit, the understanding of the requirement, consulting firm track record, and the depth of their consulting resource, and the remaining 30% is price. Another weights 30% on people, 30% on experience and 40% on cost. In all instances each buying team member completes a scoring sheet. Scores are discussed, specifically around the questions shown in Figure 4, which address the technical, functional and humanic factors.



**Figure 4: The Choosing Process**

There is a generally taken-for-granted expectation that consultants have the desirable expertise to do what is needed and would not “*have got through the door if they did not have that*” (Participants10, 14, 19, 43). This means question three is the easiest to answer, and the remainder require more discussion. All participants noted there tends to be broad agreement amongst the buying team. The general reason given was one of organisational culture binding them together and therefore a shared outlook and understanding of their organisations' needs. However, when differences arose, and someone held an outlier view perhaps, a discussion takes place until a final outcome is agreed. Rarely does the discussion include cost; it is usually a combination of the three questions in Figure 4. There was one outlier participant (5), who talked at length about the objective nature of the procurement process, designed for transparency and clarity, with cost as a core factor. By contrast, his 4 colleagues all said the discussion and

selection was about chemistry and picking the people that can work with them, their teams and external stakeholders.

### What matters to clients throughout the procurement process

Figure 4 shows the questions that are paramount in client minds as they buy consulting services. The crux is a sense of shared goals, objectives and ways of working:

*"I think where we're buying people we're looking for flexibility, we're looking for people who, once you've drafted the contract, the contract goes in a drawer and it's a joint effort" (Participant 7)*

Respondents expected 'to go out for a beer' with consultants and to talk about non-work topics frequently. Important criteria are personal and professional rather than organisational attributes. Figure 5 notes the words respondents put forward to describe the characteristics a consultant should possess.

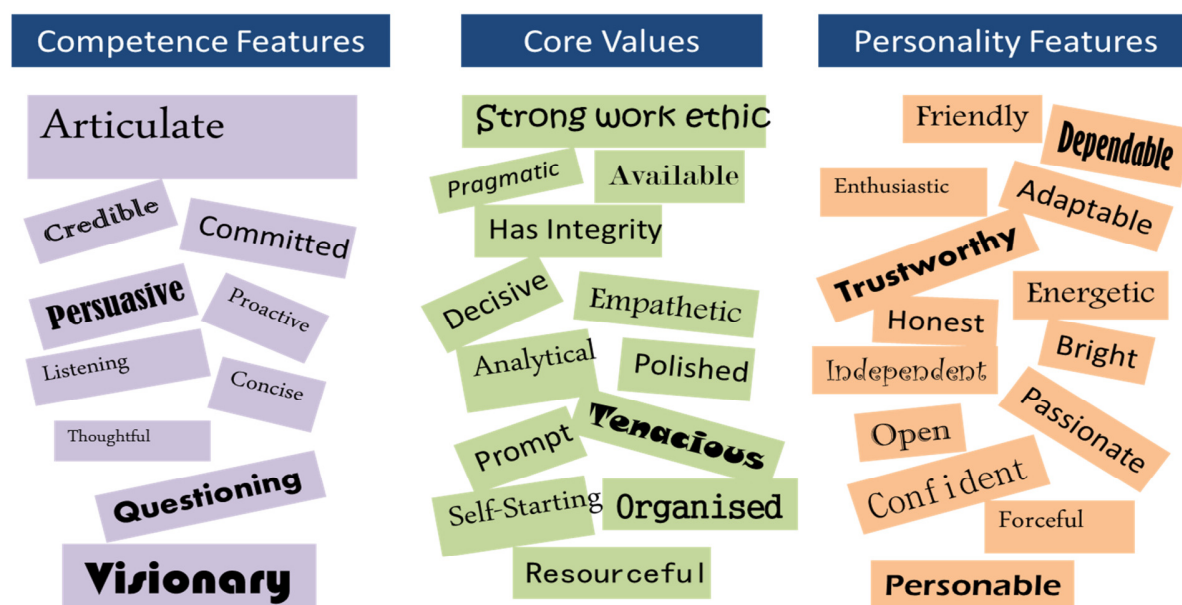


Figure 5: Personal Characteristics

The words are open to interpretation, but they do point to competence being about how a consultant demonstrates their knowledge, manifests core work values, and the strong,

vibrant, positive personality attributes pertaining to how they behave. All this is required for a professional relationship, and features prominently in the professional buying process.

## Discussion

Management consultancy is no longer infrequently commissioned, relatively discrete or ad hoc (Matthias, 2018). Consequently, clients have experience in creating and building relationships. Moreover, they do so with specific business needs in mind, and they follow a standardised, formalised procurement approach regardless of sector. The questions featuring in the choosing process (Figure 4) demonstrate that intangible factors still prevail in a client's evaluation of consultants, despite formal procurement practices implying emphasis on tangible technical and mechanical factors. Regardless of service being bought and the reason for buying, all companies followed the outlined procurement process. Partly this was conformance to legislation. The other reason was for transparency, accountability and a clear audit trail should there need to be one.

Notwithstanding this standardised approach by clients, the results of this research also highlight the continuing importance of 'soft' judgemental criteria when selecting consultants - commitment, attraction, interest and emotional bonds between individuals (Stumpf and Longman, 2000; Werr and Perner, 2007; Richter and Niewiem, 2009; Ko, 2010; Chelliah, 2011). It represents a form of buyer power because of the cultural framework each organisation operates within, but the evidence points to consultants consistently having the ability to blend with that. The problem for consulting firms is that it is not always they who are successful - sometimes a competitor better fulfils the remit.

The clear buying signals and steers which came from the responses give consulting firms practical insights about clients' selection and decision-making processes as they continue to focus from their side on establishing long-term relationships. Whilst all clients are unique, the findings in this research demonstrate that up to a point clients share important features. Their procurement processes are standard. The features they seek from their consultants also appear standard. Clients are focused on achieving specific goals from projects. These goals provide specific context to each assignment, which the respondents referred to as 'the exam question'. Through the procurement process they are exploring how specifically the consultants responded to the brief, and they expect this to be paramount when consultants design a solution. Given that consultants are familiar with asking questions, listening, seeking information, drilling for knowledge, it is not an insurmountable task to be able to take context more definitively into account and present a clearly customised solution. The knowledge is there, the expertise is there. Clients take it for granted, consulting firms recruit it. There is a strong ability to do that. It just sometimes appears, reading between the lines, that not everyone does. Clients buy those who do.

Given the increased commodification of services and codification of knowledge, in practice putting together the correct package of components should be easier than when consulting knowledge resided largely with the most senior person. Interest, empathy and trust are all strengthened by a demonstration of the abilities you were believed to possess in the first place. Interestingly, of the three questions, the third is possibly the most tangible, although it is still of course open to some interpretation. The answers to other two questions in Figure 4 are also openly discussed as part of making the decision

who to buy. However, through the protracted process of engagement the answers are subliminally, and piecemeal, constructed on an ongoing basis. To some extent each encounter throughout the procurement process provides a building block towards the full answer to both those questions, and is demonstrated through the manifestation of some of the words in Figure 5 - dependable, enthusiastic, resourceful, tenacious, proactive, articulate, and of course a visionary.

## Conclusion

This paper set out to answer two questions:

RQ1 How are consultancy services purchased?

RQ2 What matters to clients as they buy consultancy services?

Consultancy services are purchased by following a transparent, documented and formal process, which incorporates planned and ad hoc work, aligned with long-term planning and the annual budgeting cycle. Buyers are from the business and the purchasing department, so that the interests of the whole organisation are considered. From this perspective, clients are serving their own organisations better. Indeed, given the duration of the framework agreements (Figure 2) there are also obvious benefits for consulting firms, in the form of being able to 'be in it to win it'.

In answering RQ2 this study identified a combination of personal characteristics which individual consultants needed to possess to ensure all the required service components could exist. These characteristics related to features of competence and personality, and to core values such as being decisive, resourceful and tenacious. It highlighted that

within a formal procurement process clients have made personal relationships central to the selection process. This is encouraging for consulting firms as it means that developing and managing relationships remains a mutual priority.

The different starting points for consultant and client remain, and this is something firms should consider when embarking on their next 'sale'. Clients know what they want and the kind of people they want to work with. Consulting firms who wish to continue to develop their client relationships should endeavour to ensure their processes enable them to demonstrate how they are personable, good to work with and responsive to specific briefs. Customisation may be elusive, but even with standardised selection processes and commoditised service design this research shows how a level of personalisation can improve customisation and keep both client and consultant happy. The definition of professional projects is definitely not one which includes impersonal.

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