

# ENGAGE CUSTOMERS IN CO-CREATION IS CRITICAL FOR PROJECTS SUCCESS

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**Abstract:** The consultancy projects are a must-have in a pandemic context. Companies need to change or convert their business model and reinvent themselves; otherwise they lose competitive advantages. These kinds of changes are structural in the core business and mostly in the value chain, so their success is critical for the business continuity and company existence. This research aims to understand the importance of including customers in the development of new methods and processes that lead to better solutions for problems detected and at what stages of development of a management consulting project should they intervention. Findings show that customers are an integral part of the operational solution and should, therefore, cooperate in all stages of the process, since the moment of needs assessment, until the implementation.

## INTRODUCTION

In line with other fields of the management domain, the evolution of strategic disciplines in organizations has been widespread in the management consulting industry, and this is the main reason why Canback (1998) describes this sector as the path to success that must be embraced by companies in the contextualization of their strategic orientation and its professionals as the true purveyors of the complex phenomenon of corporate evolution until now known.

This same thinking has been evidenced by several authors over the last few years defending the sector as an influential and powerful tool for organizational change, bringing a new life to organizations and their procedural chains.

In a historical retrospective, the benefits of the management consulting industry were already clear in terms of the influence and contribution they generated to the growth of industries in the 1950s (Stryker, 1954), being for this same reason dubbed by Drucker (1979) twenty-five years later as an extraordinary sector and a unique phenomenon in the business context, and not only for the unique, objective and independent aid that translates into solving concrete problems (Greiner and Metzger, 1983, Canback 1999), but also by the experience it brings and which often appears associated with results related to high productivity (Fincham, 2010)

At the international level, although the progress and heterogeneity of the scientific studies carried out in recent decades in the field of strategic consulting by prestigious authors such as Sturdy (2009), Kaiser and Kampe (2005), McGivern (1983), McLarty and Robinson 1998), Fincham et al. (2008), Karantinou and Hogg (2009), Werr and Styhre (2002), Jackall (1988), Clark (2004), Whittington (2007) and Lundgreen and Blom 2009 have been synonymous with added value, a fact to be highlighted is that who works with the strategy have not received much attention in the strategic field of research. Whittington (2007) introduces an example of this by highlighting that no articles on consulting in one of the leading strategy newspapers such as the "Strategy Management Journal" have been published until 2007.

In a more practical component, although the recent strategy-as-practice (SAP) movement has implied some attention to the importance of consultants (Whittington, 2006; Jarzabkowski et al., 2007; Jarzabkowski and Spee (2005), the truth is that this importance has hardly been reflected in the SAP literature, with exception to the works of McLarty e Robinson (1998), Kaiser and Kampe (2005), and Lundgreen and Blom (2009), the latter with a high degree of greater exposure as it is presented on the international community's website of academics and practitioners of strategy as practice.

Thus, in order to combat the lack of studies in this emerging area, it is necessary to reach this market and perceive this activity, bringing to the academic field a considerable amount of information that contributes in a concrete way to the development of this field of research being one of the ways to make it perceive and define the characteristics and factors that lead to the identification of the identity of this industry, realizing their relationship with the market in terms of knowledge, rather

than identify only a set of static techniques to be applied (Fincham and Clark, 2002).

Taking into consideration the theme presented here, this study aims to relate two variables, the management consulting industry and its SME framework, in an attempt to understand the importance of including clients in the development of new methods and processes which lead to better solutions for the resolution of problems found and, at the same time, to understand at what stages of development a management consulting project should intervene.

In this sense, the present study seeks to contribute to the development of scientific knowledge in the management consulting area through the following objectives: (1) Realize the importance of including customers in the development of new methods and processes that lead to better solutions for solving the problems found, (2) to realize in what phases of development of a management consulting project must be implicit this same inclusion, (3) understand how the command signal given by management consultants at project leadership may or may not be synonymous with unison power that puts them completely out of any threat, and (4) if based on these possible findings, we can frame managers and consultants in the theoretical analogy titled doctor-patient relationship.

This article is divided into four parts. The first illustrates the theoretical basis of the topic, the second part describes the methodology inherent to the development of this research, the third presenting the results obtained and a fourth where that results will be discussed empirically. Finally, some final considerations about the study will be presented.

## LITERATURE REVIEW

Until the late 1970s the literature on management consulting was almost unanimously passing the "management impression" that all problems could be solved and that only the experts (consultants) had a natural ability to do so (Czarriawska, 1988, Bloomfield and Best, 1992, Bloomfield and Vurdubakis, 1994), reproducing a positive image of management as something powerful and that can be perfectly controlled (Clark and Salaman, 1996). The client is in this perspective portrayed as being in the hands of the consultant despite the fact that, according to Sturdy (1997), it is not only customers who feel this type of anguish, complexity and uncertainty in the context of business management, since the consultants can also feel this kind of feelings, either by pressure from customers to improve organizational performance or by pressure from colleagues and the consulting firm to generate repeat business.

From the theorization of this "critical" approach, convincing customers of their value (Werr and Styhre, 2002), questioning the safety position of the consultants (Sturdy, 1997) and question the ability of customers to resist to the rhetoric of consultants (Fincham, 1999) is seen as the central focus in consulting work.

Such theorizations, according to the arguments of contemporary discourses that organizations have evolved from bureaucracies to networks, imply different constructions in terms of the client-consultant relationship beyond the base of the assumptions

mentioned here, involving various expectations as to what would be the appropriate behavior, whether the consultant assume the role of superior or subordinate to the manager.

This same ambiguity between the different views and perspectives regarding the influence of the consultants in the transfer of their knowledge is also expressed in the Canback's article (1998), "The Logic of Management Consulting", when it reproduces on one hand the perspectives of Martin Bower and Bruce Henderson (the forces behind the McKinsey and Boston Consulting Group companies) and on the other, the information landscape resulting from a set of more than 200 interviews with internal managers from various organizations.

Thus, if Martin and Bruce's view refers to the perspective of external advisors as the true independent force with enough ability to create action and provide skills which are not available internally, defining them as the true costumers partners in solving unstructured problems and describing them as the only ones capable of promoting synergies of efforts in the creation of secure relationships, the perspective of internal managers, considers them expensive, not available at the right time and reproducers of ideas almost always based on something which does not contemplate a correct understanding of the costumers' organizational environment, which represents a critical perspective about the added value they add to the organizational structure.

From this reproduction is possible to perceive a great deal of ambiguity in the understanding of what should be the ideal relationship between the parts, since neither equates the possibility of perceiving equality as an alternative.

Exploring the interaction between consultants and costumers in the different ways of relating and taking into account the set of readings, ideas, approaches and interpretations held by various authors in the description of the functionalist and critical perspectives, what can be observed is that it is a clear gap of analysis in what the development of this area is concerned, because in theory a manager does not have to limit himself to choose between the consultant as superior or subordinate, and must equate, whenever possible, the equality of powers as an effective alternative between the parts in the development of different types of projects where they are involved (Tilles, 1961). This point of view does not remove the contextual importance of the functionalist and critical approaches, a fact that is verified is that both were an important mark in the positioning of understanding about the consultant-client relationship, what this perspective adds is a more situational and contingent view compared to what the measures proposed by these two images reiterate (Sturdy, 1997; Fincham, 1999).

Taking as an example the functionalist perspective described by Schein (2002) in which feelings are essentially linked to cultural factors in a given period and space, and Fincham's (1999) and Kipping's (2002) critical view in which it is suggested that relationships can vary in terms of space and time by institutional ideas of the nature and image of management and management consulting, as is the case of boundaries and division of labor between problems perceived on a daily basis by companies and managers, Werr and Styhre (2002) emphasize the importance of ideas and institutional practices (

called discourse by the author) as an important factor to consider in the costumer-consultant interaction.

According to Werr and Styhre (2002), instead of considering only an interpersonal basis, the client-consultant relation emerges from the relational game between different characteristics of a given specific situation between actors, without that there is a default in terms of the nature of the roles of both sides. The relationship results from the development of mutual activities in situations and dependent contexts, which goes to the mismatch of certain management discourses that determine the legitimate nature of relationships.

Here, even though the boundaries of discourse are difficult to determine, Werr and Styhre (2002) have used the bureaucratic dichotomy of bureaucratic organization of Crozier's (1964) and Dugay (2000) and networking of Gulati (1999) and Seufert et al. (1999) as the theoretical analysis model for the question of relationships built between consultants and clients.

Contextualizing the subject from the bureaucratic discourse theorized in the 1940s and 1950s by Max Weber and Taylor (characterized by routines, standardized and manual operative procedures based on a clear separation of brain and manual work, where the manager assumed full organizational control of the company) to the knowledge society (Bell, 1973) or networked society reproduced by Castells (1996) [where change and flux are constant threats to the business environment, passing routines and procedures to be standardized in a constant process of organization and redesign in order to enable enterprises to better adapt to the constant influence of the external environment - control goes to the background, passing the slogans to be leadership, training, support and business sense (Jackson, 1999, Adler 2001; Brocklehurst 2001) , both perspectives are considered as intrinsic aspects in the most diverse management practices, because they are the ones that in fact force the client-costumer relationship to flow in different directions and opposite paths. From this idea and according to Werr and Styhre (2002) the functionalist and critical approach can be considered simultaneously, because if on the one hand there is a need to seek to respond to a contemporary style of business in practical terms, on the other, it is also necessary that there is in this context the bureaucratic rationality of the process, based on the control of and on the management.

In this manner, as suggested by Werr and Styhre (2002), the client can alternate between the consultant's view as an integral part of the organization and, at the same time, be aware of the loss of the management role in the relationship. In this perspective, the consultant can act as an internal subordinate under the control of the organizational manager (bureaucratic image), while maintaining the necessary autonomy that must be contained in the basic characteristics of a specialist external to the organization, acting like a colleague of the manager in an attempt to find strategic practices and models that allow organizational development in a proactive way. The client will be developing an ambivalent attitude that allows him to maintain his role as "in control" and, at the same time, create a close dependence on the consultant's work.

But if the three different perspectives of the study of the

relational role between consultants and clients refer us to the study of the nature of consulting strategies and to their typified view of consulting as a powerful persuasion system, a more structured view of this paradigm is needed, focused on the discourse of industry and on the constraints of the role of consultancy resulting from external forces. Contrasting the different perspectives, Fincham (1999) contributed to this field of study with a view that allows to explore the different forms of relationship between consultants and clients, making clear the consultants' stratagems and the basic nature of consulting as a type of market relationship within a management structure, outlining a continuous structure anchored in a strategic and structural perspective that allows to perceive the role of the management consultants in the process of organizational change (customers with considerable market power and, through concentration and interdependence between consultants and clients).

While it is true that the consultants are in a business of creating knowledge, but many acts only as providers of ideas, which then leads many business managers to see them as experts and base this relationship on a dominance and dependency approach. Fincham (1999) clearly demonstrates this paradigm from the analysis of two case studies carried out in 1999. An important alternative to this type of dependency goes through the resistances that can be made by managers in the implementation of efficient business practices by these professionals in their organizations. In other words, the role of the consultant in the management of organizational processes should provide not only the strategic perspective associated with consulting practices and their implementation in an attempt to solve the problems of organizational activity (Schein, 1988; Argyris, 1990; Clark, 1995), but also a structural perspective (focused on the constant changes of the international economy) that requires cooperative changes in the most varied contexts (Ackroyd and Lawrenson, 1996).

The perfect approach, according to Fincham (1999), requires the complementarity of these two perspectives and must be considered jointly in the identity of the consultants themselves. It is important to realize that none of this makes it impossible for the consultant-client relationship to be asymmetric, on the contrary, the balance of powers should, whenever possible, remain equitable and cooperative, and be fed by a network that allows beneficial gains for both parts from the sharing of different mental structures coupled with the variety of methods and technical concepts presented by the consulting professionals.

In this sense, this research seeks to understand if in Portugal it is important to consider the inclusion of clients in the development of new methods and processes in any management consulting work and, if so, in what phases should this intervene in terms of this same development. Intrinsically, it will still be important to understand if the command of action by the consultants can mean that they can be completely out of any threat or pressure by framing this analysis in the typical physician-patient analogy whose patient only reproduces the meaning of the symptoms of his illness and the doctor independently prescribe the solution for the cure of his ills.

**METHODOLOGY**

The present investigation is based on a pragmatic or inductive approach and was conducted from a non-probabilistic convenience sample, created according to the availability and accessibility of the elements covered (Carmo and Ferreira, 1998), in this case by management consultants and senior managers of Portuguese SMEs. 300 questionnaires were sent to SMEs and 350 to management consultants (including 50 independent consultants) by e-mail. 37 questionnaires from PME managers were returned and 29 from management consultants, totaling 66 questionnaires filled with a response rate of 10.15%.

However, considering that the interest of this research was centered in discovering the meaning and representing experiences of multiple realities, it was also used as a qualitative method of analysis the realization of 17 interviews with 9 senior management consultants and 8 managers of SMEs in Portugal, having the sample at the level of the interviews carried out had an intentional character, having been selected participants who best represented the phenomenon investigated in terms of knowledge.

In terms of qualitative analysis technique used for interpretation of the data reproduced from interviews, this resulted in content analysis, trying to relate the semantic (meaningful) structures with the sociological structures (meanings) of the utterances, in order to articulate the text surface with the factors that determine their characteristics - psychosocial variables, cultural context and context, processes and reproduction of the message (Figure 1).

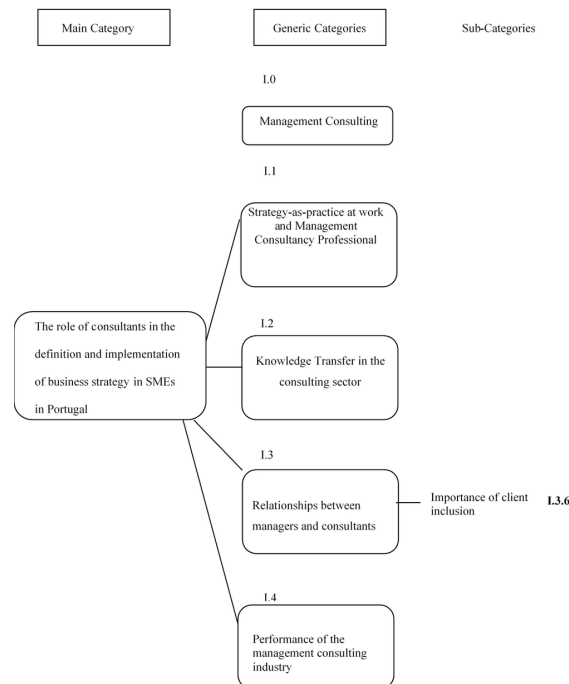


Figure 1: Categorization and coding of the interview corpus for qualitative analysis

In summary, this research was based on a set of primary sources, from the application of surveys on the form of 17 semi-structured interviews to 9 consultants and 8 managers of SMEs, and from the application of questionnaires with open and closed questions to 29 consultants and 37 SME managers from Great Lisbon, Douro, Leiria, Setúbal, Madeira Archipelago, Minho, Beira Alta and Algarve (Portugal), being the sample representative of a group of respondents predominantly male (63%), whose ages have a mean arithmetic value of 37 years. Almost all respondents have a higher education level and have been working in their current companies on average for about 8 years. It should also be noted that the sample at the SME level is fundamentally linked to the retail and consulting area in the most diverse sectors of activity that characterize the business management area.

**RESULTS**

One of the conclusions we have drawn from the analysis of the literature is that when we analyze the critical view of the relationships between consultants and PME managers, we have the idea that the management of the consultants reproduces something powerful and perfectly controlled. But will the command of action be synonymous with unison power that puts the consultants completely out of any threat? (Figure 2).

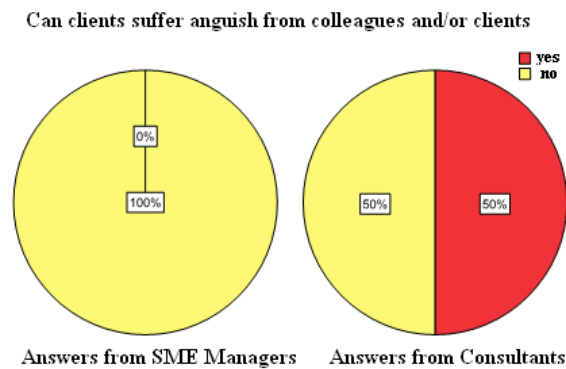


Figure 2: Consultants and clients approach to the possible distress

Note: Yes - consultants suffer anguish from their employer and their colleagues, no - the consultants do not suffer anxieties on the part of their employer and their colleagues

In fact, although clients seem to be unaware of this fact, it is noticeable through the consultants' responses are not only customers who can feel some kind of pressure or anxiety due to the complexity and competitiveness currently experienced in organizational structure that makes up the global business community. As reflected by Sturdy (1997), either by pressure from customers on improving organizational performance, either by the pressure exerted by colleagues and by the companies themselves in order for a business to be are generated constantly, the truth is that consultants are often under threat also.

But if the threats in terms of generating repeated services are difficult to manage for the consultants, even because they are linked to the investment criteria of the companies, in which case the consultants have little room for maneuver, regarding the threats made by the clients these can in fact be bypassed. The cooperation (Figure 3) and the inclusion of clients within the projects (Figure 4) are indeed a determining factor in turning this situation around.

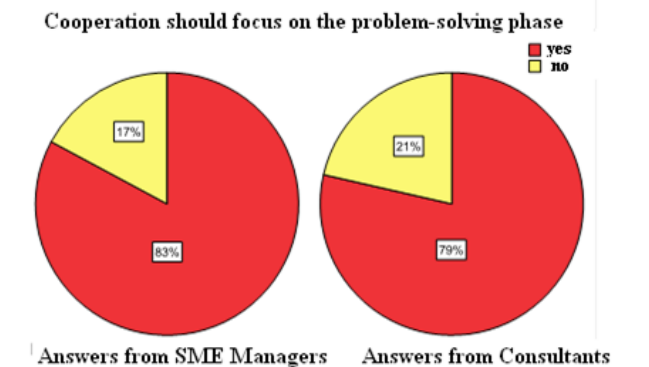


Figure 3: Client cooperation in a management consulting project

Note: Yes - cooperation should focus on the solution phase of problems; no - cooperation should not focus on the problem-solving phase

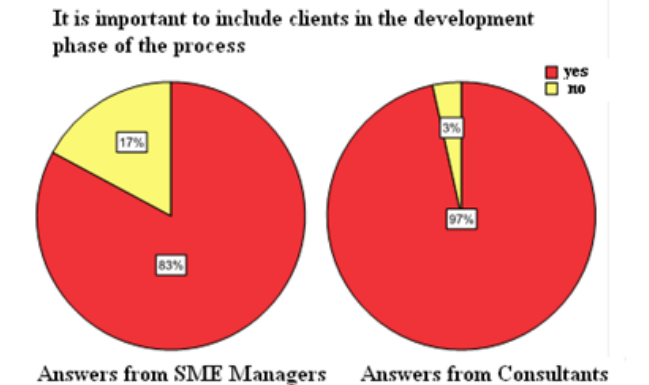


Figure 4: Inclusion of clients in the development of new methods and processes

Note: Yes - it is important to include clients in the process development; no - it is not important to include clients in the process development

In this sense, although the respondents focus on the problem-solving phase, as initially suggested by the questionnaire, the truth is that this dependence requires cooperation not only at this stage, but as defended by McGivern (1983) throughout all the process - Content analysis (Table 1), involving the needs assessment phase, diagnosis, brainstormings, action plans, all decisions (including the final decision), negotiations, validation phases and obviously at the implementation time.

Content Analysis - Interviews			
Interviewee	Text	Generic Category	Sub Category
Consultant 2	The client is part of the process, always. Without him there is no conclusion. There is no selection. There is nothing.	1.3	1.3.6
Consultant 4	The customer must always be included. When the client gets little involved and leaves all the work for the consultant, the consultant runs more risks, but can execute and implement the project. It is riskier because there is no real partnership relationship.	1.3	1.3.6
Consultant 5	It is always important in any of the different parts of the process.	1.3	1.3.6
Consultant 3	The client in this type of situation should be included in the resolution of the problem itself. It is important to be involved because in implementation it will clearly identify. He must be an active agent in diagnosis, an active agent in the design of the future organization and is an active agent in the implementation.	1.3	1.3.6
Consultant 6	But at times of validation of the action and should be absolutely intervening in organization chart definitions.	1.3	1.3.6
Consultant 5	All decisions have to be shared, consensual, even negotiated, and he has to feel that he has participated in them. If you do not feel you feel that this is the consultant's strategy and not his.	1.3	1.3.6
Manager 1	No doubt. The customer has to be involved. For me, it has to be always involved, and it has to be consulted whenever.	1.3	1.3.6
Manager 3	We ourselves have an interest in participating and actively contributing to the development of the project, and we will monitor daily or weekly the progress of the work. We can thus easily anticipate problems, anticipate delays, make corrections, whatever. If we do not it is easy to lose control. So I would say that involvement is very important.	1.3	1.3.6
Manager 4	It depends on the type of consultancy. For me it is not sure at the end.	1.3	1.3.6
Manager 1	The client has to be always involved, mainly in the decision making about the direction of the project.	1.3	1.3.6

Table 1: Content analysis - the importance of including clients (managers) during all phases of development of a management consulting project

Finally, analyzing the evaluation of the respondents (managers and consultants) relatively to the management consulting projects in the doctor-patient analogy, the majority of respondents see this analogy as valid (Figure 5), although the clients (managers) indicate that the resulting relationship should focus on increasing the performance of a particular activity that needs to be improved, focusing on building strategies, concentrating efforts in areas of concern, and fundamentally identifying the client and the business and the interests, values, attitudes and visions of clients (Table 2).

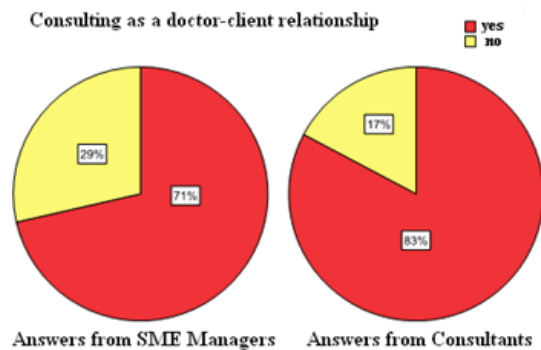


Figure 5: The context of the management consulting projects in the medical-patient analogy

Note: Yes - be seen according to the doctor-patient analogy; no - management consulting shouldn't be seen according to the doctor-patient analogy

Basis of Constructive Relationship (consultants and clients)	Values
Customer and business identification	83
Customer - interests, values, attitudes, visions	70
Focusing on the performance of particular activities	68
Focus efforts on areas of concern	52
Focusing on strategy building	48
Attention to the feed-back and reaction of participants	32
Results based on techniques to be applied	31
Discussion of methods and approaches	28
Emphasis on the interdependence between the parts	10
Freedom of consultant	7
Emphasis on researcher's role	5

Table 2. Basis in which the constructive relationship between consultants and managers should be based

Note: Clients/managers perspective (the five most important were considered by each respondent - 5 the most important to 1 to the least important)

**DISCUSSION**

Although the guideline of the Portuguese management consulting market is almost always related to the critical and integrative view of relationships (a line that integrates the critical and integrative view of relationships, assuming that it should always be the consultant to assume a position action, while acting as a facilitator in the practical help that can be provided to the client), it is important to keep in mind that internal consultants and managers realize that this reality cannot be compared in the same way given the different specificities that can be allocated to different types of projects, being important that they understand what role they should play in each of these particularities.

However, in this context, it is important to highlight that the client must be an active agent in the design of the future organization during the course of the project, and their participation is vital for the anticipation of problems, delays and possible corrections that may have to be made, customers are an integral part of the operational solution, which without the proximity and communication effect would not allow them to know what is being done, what is missing, what are the needs, what has already been perceived and what is the perception that has already been about the events. His deep knowledge about business is key in this regard, and he should therefore cooperate in any and all stages of the process, whether in the moment of needs assessment, diagnosis, brainstorming, action plans, decisions, negotiations, validation phases, and, obviously, in the implementation.

Without effective cooperation between consultants and clients, the paradigms of knowledge and resistance are strangled early on. Briefly, management consulting should be based on what can be called the "Co-responsibility" Consultancy, in which the consultants carry the means and the clients provide the content, that is, on one side there is the catalysis phenomenon (consulting) and on the other action (customers).

It is for this reason that the management consulting phenomenon cannot be seen as an identical process to a daily doctor-patient relationship as most respondents in the sample call it, not only because this analogy provides the definition of

individual in individual terms, but also because it focuses on professional conduct that does not assume in the majority of times any relation of dependence and proximity between the parts and, because it portrays the image of the consultant as someone pretentious, which in any of these cases defuses the bases of what must be the cooperative scope of a management consulting project, being to completely reject this analogy as Tilles had done in 1961.

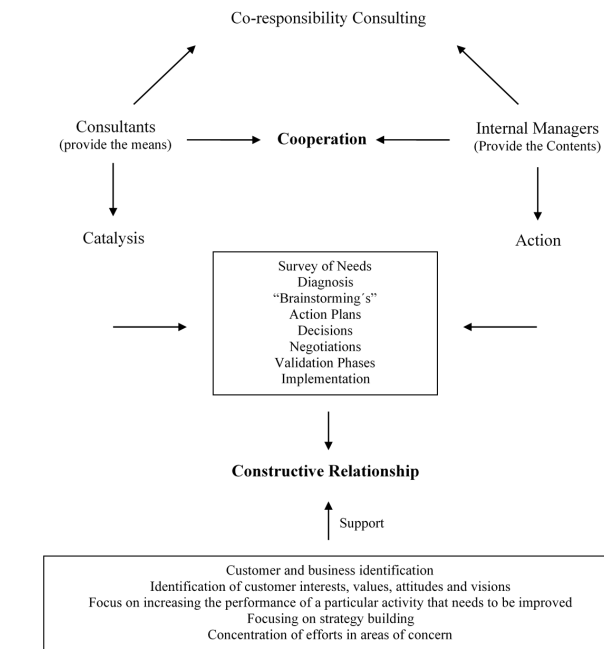


Figure 6. The cooperative model of the management consulting industry

Instead, the principles of support for a constructive relationship between consultants and clients should, above all, result from the focus of attention on increasing the performance of a particular activity that needs to be improved, on strategy building, on concentration of efforts in the areas of concern and, essentially, in the identification of the client and the business and in the identification of their interests, values, attitudes and visions (Figure 6).

The cooperative model of the management consulting industry results from "what" is done and "how" the work of management consultants is done, with priority being given to the discovery of situations that result in strategic activity, called by Johnson et al. (2003: 3) as "micro activities that decompose the strategy into strategy-as-practice", and these can be seen as the life of a strategic process in terms of the micro phenomena that constitute it (Whittington, 2006; and Spee, 2009; Jarzabkowski, et al., 2009).

**CONCLUSIONS**

Although the quality of the consultants has to do with the perception of value in terms of the intrinsic content of the generated knowledge, it can also be linked to the types of relationships that are built between the parts, and the creation of proximity relations in this context gains special emphasis, even because it infers decisively in the work that is produced, allowing to generate knowledge and satisfaction.

Empathy, institutional relations, the degree of openness, the degree of participation, the availability and the facility of communication are all elements that can effectively be considered as fundamental capital gains for achieving the goals originally outlined and, not only during the phase of the project, but also in the post-implementation, with all the subsequent advantages that may result for each of the parts.

In this way, it can be seen that the assumption of the word excellence can be contained in the range of sharing and networking, with the different mental structures of the actors, combined with the variety of technical methods and concepts of the consultants and with the deep knowledge of the business of internal managers, generates what can be called the "triangle of success".

The word cooperation (throughout the process) must be channeled into what is called the "Co-responsibility Consultancy", in which the consultants carry the means and the clients provide the contents, being the success of the projects linked to evaluative factors, regarding the technical means that consultants put at the disposal of customers and its contents made available by these, but also to qualitative factors and the commitment, effort, competence, expertise, and establishment of efficient relationships, including those that may imply long-lasting connections.

It is important, however, to take into account that the findings presented in this study are the result of limitations inherent to a small investigation in terms of sample size (respondents) and the fact that replicate results of a given particular context (SMEs) in a particular country (Portugal).

In this sense, in terms of external validity, i.e., the possibility of generalizing the results found to other contexts or samples, although this study has reinforced some of the existing theory regarding the concept of management consulting, this was only an exploratory study that cannot be generalized or representative.

On the other hand, although have been used secondary sources and other analyzes have been elaborated to complete the results, this factor cannot justify that the results presented here can be seen as necessarily generalizable in terms of the consulting practice. Another of the limitations was related to the impossibility of observing "in loco" client-consultant interactions and, therefore, the consequent peculiarities of problems, ideas and techniques that could result from this interaction.

Although this article aims fundamentally to combat the lack of studies on the management consulting industry, it is necessary to continue to deepen the knowledge about this market and to perceive this activity, introducing to the academic field a considerable amount of information that brings above all originality and contribute concretely to the development of this field of research.

One of the ways to respond to this gap is focusing, establishing and institutionalizing the practices and activities used in the management consulting industry and their implications in terms of organizational results, seeking the achievement of a set of new developments in the construction of literature with the introduction of new theoretical and empirical perspectives in this area.

In short, it is important to extend these studies to a deeper basis on all these subjects, in order to explore the future of the nature of practices, activities, stages and relationships in the management consulting industry, and future research may include the construction of a model that allows relating all these variables, in order to identify which of them is most determinant for the success of a management consulting project. The ongoing task of the sector study should also not forget the impact that all of this may have downstream of the chain, namely in terms of the level of satisfaction of the client companies with regard to the work carried out by the consultants and of the suggestions they advise to improve the performances that may be obtained.

## AUTHORS



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