



## **Management Consultancy Network Coffee Chat**

**Wednesday 29 June, 08:30-09:30 on Zoom**

### **Meeting Notes**

The discussion was chaired by Dr Claire Brewis and focused on the following questions:

***Given that management consultancy services are delivered in a client environment, and hence there is some dependence on client performance, how can consultancy excellence be assessed? How can client performance be assessed?***

Three broad themes emerged; recommended reading is provided at the end of the notes:

#### **Consultancy as a joint venture between client and consultant**

- Consultant delivers in the client's environment, so is consultancy excellence dependent on client success?
- Joint venture between client and consultant- likened to marriage guidance for groups or pairs of companies. Need to understand why their collaboration is not working as well as it could be.
- Different perception of performance by clients and stakeholder groups – some may win, some may lose because of a consultant's intervention.
- Need for continual dialogue through the course of the engagement – client expectation influences what excellence looks like – assessment of excellence should be made by the client not the consultant.
- Important to distinguish between excellence of a project and of consultant's performance – consider importance and appropriateness of a project as well as its performance. Is it the most important thing the client should be doing?
- Consultant as trusted friend, giving advice and guidance – more political, less measurable – becomes more about strategy – different from project-based work – trust and relationships
- Understand how organisations can work more closely with other organisations in harmonious and cost-effective way (ref Andrew Humphries' book below).

#### **Measurement criteria**

- What are the dimensions against which you assess consultancy performance? Consider qualitative and quantitative measures at the beginning and at the end?
- How do excellence measures differ to quality measures? Excellence was described as an overused word lacking bite.

- Consultancy aim - creating knowledge and skillset for client and leaving behind sustainable change.
- Set parameters at the beginning of the relationship.
- Measure excellence by clarity and completeness of process, using innovation as a point of difference .
- Often thought of as project specification rather than measurement criteria (ISO 20700 – ref below).
- Swiss questionnaire for measuring quality in management consultancy – six categories: professional knowledge and expertise, professional conduct and behaviour, project management, implementation to date, economics of consultancy, and additional questions (ref Wohlgemuth below).
- Measuring what the client wants to achieve with SMART goals – what is the challenge they have? What is the problem they want to solve? Next steps to achieve? Why have they brought me in?
- Specification can include tangible measures including Return on Investment and soft measures.
- Consultants should focus more on intangible measurement in terms of achieving excellence e.g. skills transfer to client staff and knowledge transfer.
- Consider measurements for client's under-realised value, current value, efficiency, time-to-market, ability to innovate.
- Important to assess whether an organisation is in crisis – quickly improve or innovate –requires different measures.
- Ethics is underdiscussed – can't separate quality or excellence with an ethical approach – should discuss ethics and performance measurement together.
- Provide a feedback form for clients to measure performance forces a reflective process & informs consultant improvement & drive for excellence.

### **Measuring on an ongoing basis**

- Do you start with particular criteria to measure when delivering consultancy?
- Rarely – usually outline 'this is what we'll do, this is what it costs, this is what it will produce' – not much thought until the end of the process when writing up the engagement.
- Define excellence at level of organizational sustainability? Without criteria the client will go back to how they worked before. Consultants often revisit clients later to check they are still using the new way of working.
- Building in business improvement all along, with standards as bottom line – continuous improvement.
- Often goals are too ambitious and are not achieved but the mindset has changed.
- Establish a position pre delivery and review post delivery (eg 6 questions pre delivery): what is the issue? What are the expectations of delivery? What represents value for money? What could have been done better .
- Asking pre-delivery questions leads to a broader discussion on what the client wants to measure – soft skills not just measuring what but how they can be delivered.

## References shared by the group

- Implementing and Managing Collaborative Relationships – A Practical Guide by Andrew Humphries and Linda McComie <https://www.routledge.com/Implementing-and-Managing-Collaborative-Relationships-A-Practical-Guide/Humphries-McComie/p/book/9781032117386>
- Guidelines for International Standards for management consultancy <https://www.iso20700.org/content/about-iso-207002017>
- Wohlgemuth, A C (2006). Evaluation of Consultancy Engagements: The Swiss Questionnaire for Quality in Management Consultancy. In: Deelmann, Thomas; Mohe, Michael. Selection and Evaluation of Consultants. München: Hampp, 111-119.
- Evidence Based Management, adopted widely in agile methodology: <https://www.scrum.org/resources/evidence-based-management>
- Growth: Building a Successful Consultancy in the Digital Age by Joe O'Mahoney: <https://www.amazon.co.uk/Growth-Building-Successful-Consultancy-Digital/dp/0367710846>

Centre for Management Consulting Excellence (CMCE) Awards will take place in November and entries are currently open: <https://www.cmce.org.uk/sites/default/files/2022-05/CMCE%20Research%20Awards%202022%20Submission%20Request.pdf>

<https://www.cmce.org.uk/event/cmce-research-awards-2022>

The next Management Consultancy Network Coffee Chat takes place on Wednesday 28 September from 08:30-09:30 UK time. We hope to see you there, you can book your place here:

<https://www.bam.ac.uk/events-landing/ems-event-calendar/management-consultancy-network-coffee-chat-september.html>

ends.