Management Consultants Navigating Competing Systems of Engagement

Thesis

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Management consultants navigating competing systems of engagement

By

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in fulfilment of the requirements for the degree of
Doctor of Philosophy
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Abstract

The aim of the research was to explore how management consultants experience and navigate between the competing demands of their client, consultancy, and personal systems of engagement. The internal, consultancy-facing role of the management consultant, which involves ongoing responsibilities for the day-to-day operation and success of their consultancy, sometimes alongside their client work, has not been researched sufficiently. The implication for the day-to-day experiences of management consultants, is that they must balance their participation between three, often competing social systems of their client, their consultancy, and their personal life. Their skills in managing transitions between these systems are worthy of study.

The thesis draws on empirical research performed with practicing management consultants in 2019. I used conceptions of liminality to provide a theoretical framework (Turner, 1967, 1969; Van Gennep et al., 2019). The research design is based on Interpretative Phenomenological Analysis, a qualitative approach concerned with in-depth exploration of lived experience, and with how people make sense of that lived experience (Smith, Flowers and Larkin, 2009). Data collection focused primarily on semi-structured interviews across three consultancy settings.

The research contributes to existing theory by establishing that management consultants have an internal, consultancy-facing role which for some may be substantial. The research also establishes that management consultants’ experiences of liminality are far more complex than previously represented in the literature. Liminality for management consultants is neither linear nor permanent but non-linear, multi directional and multi-dimensional. They experience a recurrent kind of liminality based on multiple belonging. None of the forms of liminality experienced by management consultants corresponds closely to the idea of a three-stage linear process tied to rites of passage in the anthropological literature (Turner, 1967, 1969; Van Gennep et al., 2019). The research also contributes to the slowly growing body of work using Interpretative Phenomenological Analysis (IPA) in business and management research.
This thesis is dedicated to my father:

Derek Haslam Tyson

who sadly passed away on 15 May 2017 at the very beginning of my PhD journey.

He was an inspiration and the work ethic he instilled in me has stood me in good stead for my PhD studies and indeed, throughout my life
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Publications arising from this study

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Conference papers arising from this study

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“Exploring the Liminal Experiences of Management Consultants”. Full paper accepted. British Academy of Management, 2021

“Management consultants navigating inter-organizational collaboration in temporary teams”. Full paper accepted. European Group for Organisational Studies Colloquium, 2021

“Management Consultants and the Zone of Liminal Avoidance”. Full paper accepted. British Academy of Management Conference, 2020


“Exploring the Dual Role of the Management Consultant”. Full paper accepted. British Academy of Management Conference, 2019

“Exploring the management consultant’s dual role: a review and research agenda”. Full paper accepted. Academy of Management Conference, 2019

## Contents

1. **Introduction**
   - 1.1 What is management consultancy? ......................................................... 15
   - 1.2 Background ................................................................................................. 18
   - 1.3 The research problem .................................................................................... 18
   - 1.4 Why is the research important? ..................................................................... 20
   - 1.5 Aims and objectives of the research ............................................................... 21
   - 1.6 Contributions ............................................................................................... 23
   - 1.7 Thesis outline ............................................................................................... 24

2. **Literature Review** ............................................................................................ 31
   - 2.1 Chapter Introduction ..................................................................................... 31
   - 2.2 Selecting the literature .................................................................................. 32
   - 2.3 The consultancy-facing role of the management consultant ......................... 37
     - 2.3.1 The nature of internal demands on management consultants ................. 37
     - 2.3.2 Identity regulation and control by consultancies .................................. 40
     - 2.3.3 Summary ............................................................................................... 43
   - 2.4 The client-facing role of the management consultant .................................... 44
     - 2.4.1 Client motivations and expectations .................................................... 44
     - 2.4.2 Reputation, trust, and credibility in the client-consultant relationship .... 47
     - 2.4.3 Summary ............................................................................................... 50
   - 2.5 Liminality ...................................................................................................... 52
     - 2.5.1 The concept of liminality ........................................................................ 53
4.3 Experiences of establishing a client-facing persona

4.3.1 Experiences of adapting to client preferences and expectations

4.3.2 Experiences of working with professional distance

4.4 Experiences of seeking to build a collaborative relationship with the client

4.4.1 Experiences of building client trust

4.4.2 Experiences of problematic relationships with the client

4.4.3 Experiences of coping with multi-supplier relationships with the client

4.5 Chapter conclusion

5 Navigating between the demands of client and consultancy

5.1 Chapter introduction

5.2 Experiencing and managing the tension between client-facing and consultancy-facing priorities

5.2.1 The nature of competing consultancy-facing and client-facing priorities

5.2.2 Experiences of managing competing client-facing and consultancy-facing priorities

5.2.3 Experiencing guilt when engaging in consultancy systems on client site

5.3 Experiences of coping with consultancy performance and career development expectations

5.3.1 Experiencing pressure to be visible

5.3.2 Experiencing pressure to be utilised and develop skills

5.3.3 Experiences of career progression

5.4 Experiencing different kinds of belonging and separation
5.4.1 Experiencing belonging to a consultancy team community on client site... 193

5.4.2 Experiences of belonging to an informal consultancy network............... 195

5.4.3 Experiencing feeling detached or abandoned between the client and consultancy ................................................................. 198

5.5 Chapter conclusion................................................................................................................................. 203

6 Striving for work-life balance.................................................................................................................. 206

6.1 Chapter Introduction ................................................................................................................................. 206

6.2 Experiencing the challenges of the consulting lifestyle......................................................... 207

6.2.1 Experiences of working away from home ................................................................. 207

6.2.2 Experiences of working long hours .................................................. 212

6.2.3 Experiencing travel between work and personal systems .................................. 216

6.3 Experiences of managing work-life boundaries................................................................. 218

6.3.1 Experiencing different levels of control ................................................................. 219

6.3.2 Perceiving gender as a barrier to a career in consulting ................................. 221

6.3.3 Experiences of setting firm boundaries ................................................................. 223

6.4 Experiences of making the consulting lifestyle work ......................................... 227

6.4.1 Experiencing support from home ................................................................. 228

6.4.2 Experiencing ways of maintaining wellbeing.................................................... 230

6.5 Chapter conclusion................................................................................................................................. 233

7 Discussion.................................................................................................................................................. 235

7.1 Chapter Introduction ................................................................................................................................. 235

7.2 Multiple belonging................................................................................................................................. 236
7.3 Experiencing different forms of communitas

7.3.1 Communitas of the consultancy team on client site

7.3.2 Informal networks

7.3.3 Liminal Pairing

7.4 Navigating between competing systems of engagement

7.5 Navigating engagement with the client

7.5.1 Liminal transition between not knowing and knowing

7.5.2 Navigating inside-outsider status

7.5.3 Developing a client-facing persona

7.6 Navigating between client and consultancy systems

7.6.1 Navigating competing client and consultancy demands

7.6.2 Navigating consultancy performance and career development expectations

7.7 Navigating between work and personal systems

7.7.1 Experiencing and managing the challenges of the consulting lifestyle

7.7.2 Experiences of using travel as a boundary

7.7.3 Experiences of managing work-life boundaries

7.8 Differences in consultancy settings

7.9 Conceptualising liminality experienced by management consultants

7.9.1 Multiple belonging

7.9.2 Communitas

7.9.3 Non-linear liminality
7.9.4 Bounded linear liminality ................................................................. 282

8 Conclusion ............................................................................................... 284

8.1 Chapter Introduction ........................................................................... 284

8.2 Revisiting the research aims and objectives ....................................... 284

8.3 Contributions to theory and practice .................................................. 285

8.3.1 Contributions to theory ................................................................. 285

8.3.2 Contributions to practice ............................................................... 295

8.4 Limitations of the research ............................................................... 298

8.5 Directions for future research ............................................................ 301

9 Appendices ............................................................................................. 305

9.1 Appendix 1 Research Information Sheet ........................................... 306

9.2 Appendix 2: Information Leaflet and Consent Form ......................... 307

10 Bibliography .......................................................................................... 309

10.1 Websites ........................................................................................... 309

10.2 References ......................................................................................... 310
List of Figures

Figure 1-1: Market structure of Management Consulting in the UK............................17
Figure 2-1: Themes emerging from the review of the literature.................................34
Figure 2-2: Stages in Rites of Passage........................................................................54
Figure 2-3: Liminal identity work framework............................................................62
Figure 3-1: Research Paradigm..................................................................................77
Figure 3-2: Interview schedule mapped to research questions and theory .................112
Figure 3-3: Step by Step Interpretative Phenomenological Analysis.........................114
Figure 3-4: Themes in NVivo .....................................................................................118
Figure 3-5: Themes emerging from the analysis.......................................................133
Figure 4-1: Themes in Engaging with the Client and the Client Organisation.............136
Figure 5-1: Themes in Navigating between the demands of client and consultancy ......165
Figure 6-1: Themes in Striving for Work Life Balance...............................................207
Figure 7-1: Competing Systems of Engagement.......................................................237
Figure 7-2: Different Forms of Communitas...............................................................241
Figure 7-3: Comparing aspects of liminal pairing.....................................................248
Figure 7-4: Navigating Between Competing Systems of Engagement......................252
Figure 7-5: Liminal Triggers......................................................................................253
Figure 7-6: Kinds of Liminality Experienced by Management Consultants..............279
List of Tables

Table 2-1: Steps in selecting relevant literature for review.................................33
Table 2-2: Articles in the Literature Review by Source and CABS Rank ..................36
Table 3-1: Research Settings ..................................................................................95
Table 3-2: Consulting Roles and Responsibilities ..................................................99
Table 3-3: Achieve Research Participants ..............................................................103
Table 3-4: Perform Research Participants ..............................................................104
Table 3-5: Protect Research Participants ...............................................................105
Table 3-6: Topic Guide for Meetings with Gatekeepers ..........................................106
Table 3-7: Interview Protocol ................................................................................109
Table 3-8: Example of Annotating Transcripts ......................................................117
Table 3-9: Emerging Themes ................................................................................120
Table 3-10: Incidence of emerging themes in Achieve ...........................................122
Table 3-11: Incidence of emerging themes in Perform ..........................................123
Table 3-12: Incidence of emerging themes in Protect ............................................124
1 Introduction

In this thesis I explore the lived experiences of practicing management consultants navigating between the competing demands of their consultancy, client, and personal systems of engagement. I introduce the thesis by providing context for the research. I first offer a definition of management consultancy and an overview of the size, structure and some of the challenges faced by the management consultancy industry in the United Kingdom (UK). I continue by outlining the starting point for the research which was the findings of a pilot study conducted in 2017 for the award of a Master of Research (Management and Business) Degree. I then present the research problem and why the research is important. I continue by setting out the aims and objectives of my research and the expected contributions to theory and practice. Finally, I present my thesis outline.

1.1 What is management consultancy?

The Management Consultancies Association (MCA), the representative body for the UK consulting sector, define management consultancy as:

*the practice of creating value for organisations, through improved performance achieved by providing objective advice and implementing business solutions.* (MCA, 2021)

Some management studies literature is somewhat critical of management consultancy describing management consultants as opportunists, lacking objectivity and only interested in securing the next piece of work (Bloch, 1999). Others see management consultants as legitimisers, only there to strengthen the client’s argument (Sturdy et al., 2009). Consulting methods are often described as fads and fashions supported by buzzwords, the products of discourse encouraged by management consultants themselves (Jung and Kieser, 2012).
There is also concern expressed at the absence of effective professional regulation and minimum ethical standards in the consulting industry, anyone can call themselves a management consultant (Gluckler and Armbruster, 2003; Butler and Collins, 2016).

Nevertheless, the MCA (2021) propose that the management consulting industry is important to society and the economy. They claim businesses in all of the key industry sectors engage management consultants and the work of consultants therefore affects all aspects of our lives. The estimated fee revenue generated by the global management consulting industry in 2019 was $132 billion down from $160 billion prior to the Covid-19 pandemic. The largest region by far was North America with estimated fees of $79 billion (Statista, 2021). In their Annual Report the MCA claim the Management Consultancy industry in the UK generated estimated fees of £12.5 billion in 2020 and remains the second largest management consulting industry in the world. The UK industry continues to grow and although growth was slower during the Covid-19 pandemic, according to the MCA (2021), management consulting in the UK still recorded an estimated 4.5% growth rate in 2019-2020, compared with 7% in each of the previous two years, as firms continued to work with their clients on Covid-19 recovery and post-Brexit projects (MCA, 2021).

There is downward pressure on consulting fees as many large companies reduce their budgets for external management consultants and build their own internal consulting departments (Consultancy.uk, 2013). This means that, whereas the consulting industry continues to grow, average annual fee income per consultant continues to decline, with some exceptions such as niche offerings and digital (Statista, 2021). The research was therefore performed against a backdrop of reducing margins and increasing pressure for management consultants to be fully utilised on client engagements.
The consulting industry spans a wide array of firms. Some focus entirely on management consulting work. Others are part of larger firms that also undertake IT systems development, outsourcing, and other activities (MCA, 2021). There are a vast number of management consultancies. However, as shown in Figure 1.1 below, the structure of the industry is such that 85% of firms are freelancers operating as independent consultants. According to Consultancy.UK (2018), an online platform for news and data on the UK consulting industry, just 20% of consultancy work went to these independent consultants. The remaining 15% of consultancies are small, mid-size and large consultancies (Consultancy.UK, 2021). The focus of my research was practicing management consultants engaged in delivering projects for clients, who were employed by mid-size or large consultancies in the UK employing 100 or more consultants. This ensured that the focus of the research was on the relatively small number of larger firms of greatest importance in terms of turnover and the proportion of the work of the industry they perform.

![Figure 1-1: Market structure of Management Consulting in the UK](Consultancy.UK, 2021)
1.2 Background

The starting point for the research was the findings of an ethnographically inspired empirical study I conducted in 2017 for the award of a Master of Research (Management and Business) Degree. A key finding from the study was that the demands of management consultants’ consultancy-facing role as an employee of their consultancy are more substantial than have so far been reflected in the literature. The consultancy-facing role in this context is the requirement for consultants to contribute to the ongoing operation and success of their consultancy. They do this by taking responsibility for the management and development of more junior consultants, managing and developing knowledge and contributing to bids for new business. More senior management consultants may also be responsible for internal team leadership roles. Management consultants’ “internal contribution” to the operation and ongoing success of their consultancy is assessed in regular performance appraisals. They must also spend time developing and maintaining internal networks so that they are visible within the consultancy system and get the projects they need for skills and career development. The study suggested that many internal consultancy-facing responsibilities were ongoing and must be performed alongside client work, sometimes on client site. The management consultants in this previous study preferred, when possible, to perform consultancy-facing work in the evenings or at weekends when they would have the required “headspace” to focus on it. However, that often resulted in working long hours and was not always compatible with achieving a work-life balance.

1.3 The research problem

In the literature, how management consultants experience and manage the competing demands of their client, consultancy, and personal systems of engagement on a day-to-day basis, appears to be under-researched. I use the term systems of engagement to refer to
networks of social relations that have some coherence to their character and membership. Management consultants have separate networks of social relations that are specific to their consultancy, their client engagement, and their personal life. I refer to these three networks of social relations as systems of engagement throughout this thesis.

The client-facing role of the management consultant, delivering projects for clients and developing new business, is comparatively well researched and understood (Sturdy et al., 2009; Canato and Giangreco, 2011; Sturdy and Wright, 2011; Carvalho and Cabral-Cardoso, 2008). There has also been some recent interest in how management consultants cope with the competing demands of work and personal life (Johnsen and Sørensen, 2015). In comparison, research on the consultancy-facing role of the management consultant is fragmented, focusing on the functions of the role rather than how, where and when management consultants perform consultancy-facing tasks. The consultancy-facing role of the management consultant is embedded in existing research relating to bids for new business (Haas and Hansen, 2005), knowledge management and development (Ambos and Schlegelmilch 2009), people management (Alvesson and Kärreman 2007) and internal operations, including responsibility for internal leadership roles (Richter et al., 2008; Bronnenmayer et al., 2016). These consultancy-facing aspects of the role have not so far been drawn together in a single study. The significance of the consultancy-facing responsibilities and the impact this has on the day-to-day experiences of management consultants has not therefore been fully understood in the literature.

Understanding the lived experience of being a management consultant has implications for the concept of liminality. Van-Gennep originally developed the concept of liminality in 1909. He defined it as a three-stage sequential process based on rites of passage. The sequence starts with the rites of separation from an existing state, continues with the middle, and central, phase, the “passage” itself, involving a genuine performance or trial, and ends
with the rites of re-aggregation celebrating the successful completion of the transition to a second state. The middle stage implies an actual passing through the threshold that marks the boundary between two phases. The term “liminality” refers to the middle stage (Szakolczai, 2009). The literature focuses on the liminality of the management consultant’s client-facing role, describing management consulting as “a liminal space” and management consultants as “allies of management, in temporary positions of power where usual practice and order are suspended and replaced by new rites and rituals” Czarniawska and Mazza (2003: 267). Sturdy, Schwarz and Spicer (2006: 929) describe liminality as a space where management consultants are able to collaborate with clients and facilitate change, “a fluid and unstructured space … which is both unsettling and creative”. As previously mentioned, there has also been recent interest in the liminality of management consultants balancing the demands of work and personal life. Johnsen and Sørensen (2015) describe management consultants as being in a permanent state of liminality, suspended between work and personal systems having a life besides work but discarding any idea of work–life balance. However, the existence of a consultancy-facing role for management consultants means that they must balance their participation between three different social systems, and this provides a new perspective.

1.4 Why is the research important?

The consultancy-facing role has not been researched sufficiently and it seems that management consultants must cope with the competing demands of their client, consultancy and personal systems of engagement, systems that are largely outside of their control. Their skills in managing transitions between them are worthy of study. The research is important as it brings together different perspectives and new ways of thinking about liminality as well as management consultancy. The research will also provide useful practical information for management consultants on how they can balance the often-competing demands of the
different social systems with which they engage. This may help to improve wellbeing and make a career in management consulting more sustainable. The research also has the potential to provide management consultancies with useful information that will help them retain the management consultants in whom they have invested. Staff turnover is an ongoing problem in management consultancy. Employee attrition in the global consulting industry averaged 12% over the last seven years (Statista, 2021)

1.5 Aims and objectives of the research

The research is situated within theory on management consultancy. I also draw on existing theory from broader organisational contexts and liminality to explore how management consultants experience and navigate liminal transitions between their competing systems of engagement. Management consultants typically participate in three such systems, their client, their consultancy and their personal life. The central research questions are therefore:

- How do management consultants experience and navigate between the competing demands of their client, consultancy, and personal systems of engagement?

and

- How can conceptions of liminality illuminate this?

I identified four subsidiary questions for the research, expressed below as objectives. These were informed by the experience of the pilot study and the initial review of the literature:

- The first objective was to explore how the consultancy-facing role of the management consultant unfolds in terms of the tasks involved and when, where, and how these tasks are undertaken. Existing knowledge of the consultancy-facing role is fragmented in the literature and the research is an opportunity to draw this aspect
of the lived experience of being a management consultant together. When where and how consultancy facing work is performed also has implications for liminality.

- The second objective was to understand what management consultants experience as effective ways of navigating the demands of competing systems. This will contribute to existing knowledge of management consultancy and liminality and also help to provide useful practical information for management consultants and consultancies.

- The third objective was to explore how the management consultant’s experience is shaped by their own role and its context in terms of grade seniority. The responsibilities for each management consulting grade differ. More senior management consultants have a lower utilisation target and more internal responsibilities and it seemed likely that how competing demands were experienced and managed may also differ.

- The fourth objective was to explore how the context of the consultancy team shapes the experiences of consultants. The pilot study indicated that internal networks were important for management consultants. The sense of belonging and anti-structure of the consultancy team on client site may also offer valuable insights on liminality for management consultants.

The study was exploratory and interpretative. I adopted an engaged interpretivist research paradigm. My methodological framework was based on Interpretative Phenomenological Analysis (IPA), a qualitative approach concerned with in-depth exploration of lived experience, and with how people make sense of that lived experience (Smith and Shinebourne, 2012). IPA is idiographic in nature, focusing on the experiences of individuals, and therefore an appropriate method to meet the substantive aim of the research (Smith, Flowers and Larkin, 2009). Data collection focused primarily on in-depth semi-structured interviews with management consultants. Participants were drawn from three consultancy
settings, two mid-size and one large consultancy. This was a break with the IPA assumption of a homogeneous sample. There was no intention to select strongly contrasting cases to enable comparison. This was more a means of introducing some areas of possible difference to ensure I was able to develop a multifaceted account of the phenomena under investigation. In line with the theoretical underpinnings of IPA, participants within the three consultancy settings were selected purposively to access a specific perspective, namely the lived experience of being a practicing management consultant.

1.6 Contributions

My contributions to theory are threefold. First, I contribute to theory on management consultancy by presenting a more comprehensive understanding of the consultancy-facing role and how management consultants experience and navigate between competing client, consultancy, and personal systems of engagement. The research also provides a greater understanding of how this experience differs by grade seniority.

My second contribution to theory relates to liminality. Existing managing consultancy literature focuses on the liminality of the client-facing role of the management consultant and more recently between the competing demands of the client and personal systems. By drawing on existing knowledge of liminality from broader organizational contexts and combining this with knowledge gained from the empirical investigation, the research contributes a much richer picture of the different kinds of liminality experienced by management consultants, not only in the dyadic relationship that develops with the client, and the productive use of liminality to bring about change within the client system, but also how management consultants manage and experience maintaining a presence and participation in their personal and consultancy systems and how professionals such as
management consultants cope with being ‘betwixt and between’ in current contexts of organizing.

My third contribution is methodological and interdisciplinary. IPA is a relatively new method first described by Smith (1996). The dominant use of IPA has been in psychology, health and social sciences. This research adds to the slowly growing body of work using IPA in business and management. It also provides insight into a particular form of IPA that embodies an element of logic of comparison between settings.

The research contributes to practice by providing management consultants with insight into ways of working that help them cope with the demands of competing systems of engagement and make a career in management consulting sustainable long term. The research further contributes by providing insights for management consultancies on ways of supporting their consultants that may reduce attrition.

1.7 Thesis outline

The thesis comprises eight chapters including this introduction, where I provided an outline of the context and importance of the research. I then summarised the substantive aim to use conceptions of liminality to understand how management consultants experience and navigate between competing systems of engagement, and the high-level contributions to theory and practice. I now provide an outline of the structure of the thesis and what will be covered in each subsequent chapter:

Chapter 2: Literature review

In this chapter I begin by presenting the process I followed to select relevant literature on management consultancy and liminality, the sources of the literature and the themes identified. I then begin my review of these two streams of literature, starting with
management consultancy. I first review literature that provides some indication of the consultancy-facing role of the management consultant and the nature of the demands placed on them by their consultancy and the different ways in which consultancies exercise control over their consultants. I then review literature relating to the client-facing role of the management consultant, the motivations and expectations of clients when hiring consultants and the perceived importance of reputation, mutual trust, and credibility in the client-consultant relationship. The relevant literature on management consultants engaging with personal systems of engagement is included in the second stream of literature. In this second stream, I first review the concept of liminality and follow its development from the work of Van-Gennep in the early twentieth century through to Victor Turner in the 1960’s, and on to more recent interpretations. I also review literature on liminality that is relevant to the context of management consultants’ relationship with their clients, navigating between client and consultancy systems and between work and personal systems, and also within their consultancy system. I conclude the chapter by revisiting my research questions in the light of my review of existing literature.

Chapter 3: Methodology

In this chapter I present my overall approach to the research. I begin by providing an overview of my selected research paradigm. I then discuss the philosophical underpinnings in terms of ontological, epistemological and axiological assumptions to meet the aims of the research. I continue by discussing my rationale for selecting a qualitative methodological framework based on Interpretative Phenomenological Analysis. I then discuss my sampling strategy. First my rationale for selecting multiple research settings, the sample universe for the selection of settings, and a brief description of each research setting selected. I continue with my approach to sourcing the sample in terms of access, my approach to sampling within the research settings, and how differences in consulting grades and roles between settings
was managed. I then present details of the research participants selected. I continue by discussing sources and methods for data collection and the standards adopted for data management. I then describe how the data were analysed and present the emerging themes and incidence of the themes by consultancy setting. I reflect on my own role as a researcher and discuss the reflexive strategies I adopted to mitigate the potential impact of having previously practiced as a management consultant with a global firm. I also describe the steps taken to ensure the study achieved high ethical standards and discuss the reliability, validity, and generalisability of the research. I conclude by introducing my findings chapters relating to the three superordinate themes emerging from the research.

Chapter 4: Engaging with the client and the client organisation

In this chapter I present the findings of the first of three superordinate themes which concerns management consultants’ experiences when they engage with the client and client organisation. I first present data on their experiences when joining a new client engagement, knowing very little about the client organisation and how the aims and objectives of the engagement fit in, and how they learn to cope with ambiguity and leverage their outsider perspective and expertise. In the second major theme, I explore management consultants’ experiences of transitioning to a client-facing persona, adapting their approach, image and even the presentation of their personality to meet the client’s preferences and expectations, whilst at the same time working with what they perceive as professional distance. In the third major theme I present data on management consultants’ experiences of seeking to build a collaborative, trusting relationship with the client, how these experiences were often problematic and sometimes complex, especially when multiple suppliers with their own vested interests were involved
Chapter 5: Navigating between the demands of client and consultancy

In this chapter I outline the findings for the second of three superordinate themes which concerns the experiences of management consultants navigating between the often-competing demands of their client-facing and consultancy-facing systems of engagement. I first present data on how management consultants experience and manage the tension that often exists between client-facing and consultancy-facing priorities. I then present data on management consultants’ experiences of coping with the performance and career development expectations of their consultancy, and the pressure they experience to be visible within their consultancy whilst meeting their utilisation and development targets to ensure they are not overlooked when they are away on client engagements. Finally, I present data on management consultants feeling a sense of belonging to a range of different liminal consultancy communities. Some management consultants referred to their consultancy as “the mothership” in the context of belonging and maintaining perspective as a management consultant. That sense of belonging was more complex than simply belonging to the consultancy organisation or the client organisation, and there were times when they experienced feeling detached from and even abandoned by formal and informal structures.

Chapter 6: Striving for work-life balance

In this chapter, I present data on the third and final superordinate theme which concerns management consultants’ experiences of the competing demands of their work systems, both consultancy-facing and client-facing, and the demands of their personal system of engagement. I first present data on the challenges experienced by consultants of the so-called consulting lifestyle and the expectation that they will work long hours and stay away from home wherever and whenever needed to fulfil the requirements of the client engagement. I continue with management consultants’ experiences of travel between work and personal
systems of engagement. I then present data on management consultants’ experiences of managing work-life boundaries and the varying levels of control experienced by management consultants at more senior grades compared with those at more junior grades, and the impact of this on their ability to set firm boundaries. I continue by presenting data on the perception of some female consultants at lower grades that the lack of control they experienced meant combining a career in consulting with having children was not feasible for them. Finally, I present data on management consultants’ experiences of making the consulting lifestyle work in a sustainable way through support from personal systems of engagement and their experiences of finding ways of maintaining mental and physical wellbeing.

Chapter 7: Discussion

In the previous three chapters I presented findings relating to the superordinate themes emerging from my research. In this chapter I use conceptions of liminality to interpret the findings of my research and compare these with extant management consultancy theory, and theory from other relevant domains, drawing out where the findings support or extend existing theory and where they offer a different perspective. The stated aim of the research, and the context for this discussion chapter, is to understand how management consultants experience and navigate between the competing demands of their consultancy, client, and personal systems of engagement and how conceptions of liminality can illuminate this.

The research suggests the overarching kind of liminality experienced by management consultants is multiple belonging to their different systems of engagement. I interpret multiple belonging as a recurring kind of liminality that is so frequent as to at times appear permanent. I therefore begin the chapter by discussing multiple belonging in the context of the competing demands and varying degrees of incorporation experienced by management
consultants in relation to each system of engagement. I continue by discussing how management consultants experience different forms of communitas (Turner, 1969) as a means of coping with multiple belonging. The research suggests that management consultants experience three specific forms of communitas. I first discuss the communitas of the consultancy team on client site, I continue by discussing the sense of belonging management consultants gain from informal consultancy networks. I then discuss the communitas of liminal pairing between the management consultant and their key client, and how this differs from client consultant relationships so far described in the literature.

In the next sections of the chapter, I first discuss how management consultants experience shorter term liminal transitions within the overall picture of multiple belonging as they navigate between competing systems of engagement, and the associated liminal triggers. I then discuss management consultants’ experiences of these shorter-term liminal transitions when navigating between competing systems of engagement. For this part of the discussion, I use the themes emerging from the analysis of the data in Chapter 3 Methodology and also used to structure the three findings’ chapters. First, I discuss navigating engagement with the client followed by navigating between the client and consultancy and finally between work and personal systems of engagement.

I conclude the chapter by presenting a conceptualisation of the different kinds of liminality experienced by management consultants and relate these liminal experiences to the central research question discussing the differences between consulting settings.

**Chapter 8: Conclusion**

In this chapter I first revisit the research aims and objectives, and the rationale. I continue by using the research questions as a framework to draw together the contributions of the research to theory and practice. I then consider the limitations of the research and the
transferability of the findings to other settings. I conclude by reflecting on directions for future research to be advanced.
2 Literature Review

2.1 Chapter Introduction

In the previous chapter I introduced my research and summarised the substantive aim to use conceptions of liminality to understand how management consultants experience and navigate between competing systems of engagement. In this chapter I begin by presenting the process I followed to select relevant literature on management consultancy and liminality, the sources of the literature and the themes identified. I then begin my review of these two streams of literature, starting with management consultancy. I first review literature that provides some indication of the consultancy-facing role of the management consultant and the nature of the demands placed on them by their consultancy and the different ways in which consultancies exercise control over their consultants. I then review literature relating to the client-facing role of the management consultant, the motivations and expectations of clients when hiring consultants and the perceived importance of reputation, mutual trust and credibility in the client-consultant relationship. The relevant literature on management consultants engaging with personal systems of engagement is included in the second stream of literature. In this second stream, I first review the concept of liminality and follow its development from the work of Van-Gennep in the early twentieth century through to Victor Turner in the 1960’s, and on to more recent interpretations. I also review literature on liminality that is relevant to the context of management consultants’ relationship with their clients, navigating between client and consultancy systems and between work and personal systems and within their consultancy system. I conclude the chapter by revisiting my research questions in the light of my review of existing literature.
2.2 Selecting the literature

In their review, Mosonyi, Empson and Gond (2019) found management consultancy literature is theoretically diverse encompassing a range of concepts such as identity work, innovation, power, reputation and trust. Research on liminality is inter-disciplinary across multiple research domains. My methodology for selecting relevant literature follows that of Ozbilgin, Beauregard, Tatli and Bell (2011) and (Brown, 2015) and involves a comprehensive literature search followed by a critical review. I searched on Web of Science using search term “Management Consult*” as the topic, “Management” as the category and “Article” as the type of publication. I performed a further search using the same criteria with the search term “liminality” as the topic. I then refined my search by source selecting only those articles published in the Chartered Association of Business Schools (CABS) ranked journals for 2021 belonging to the five groups I believe to be most relevant to management consultancy:

- General Management, Ethics, Gender and Social Responsibility
- Human Resource Management and Employment Studies
- Management Development and Education
- Organization Studies
- Strategy

This acted as a further indicator of quality and relevance. I then performed a review of titles and abstracts to determine the relevance of articles to research concerned with management consultants navigating competing systems of engagement. When reviewing the selected articles I followed Greenhalgh and Peacock (2005), employing a snowball approach by tracing back citations in the initial set of literature to identify relevant articles and publications. This minimised the risk of important omissions resulting from the initial
selection protocol. I also put alerts in place to ensure that any new, relevant material was reviewed and included if appropriate. The steps for selecting relevant literature and the number of articles at each step is shown in Table 2-1 below:

<table>
<thead>
<tr>
<th>Step</th>
<th>Topic</th>
<th>Number of articles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Management Consult*</td>
</tr>
<tr>
<td>1</td>
<td>Refined by category “Management” and type “Article”</td>
<td>1850</td>
</tr>
<tr>
<td>2</td>
<td>Refined by Source (CABS Groups)</td>
<td>684</td>
</tr>
<tr>
<td>3</td>
<td>Review of titles and abstracts to determine relevance</td>
<td>70</td>
</tr>
<tr>
<td>4</td>
<td>Snowball approach tracing citations back to minimise the risk of omission</td>
<td>84</td>
</tr>
</tbody>
</table>

Table 2-1: Steps in selecting relevant literature for review

Sources that did not fall within the selected CABS groups or were non-CABS journals all related to liminality. This was also the case for 7 of the 8 selected books and book sections identified as relevant during Step 4. Although I did not set a restriction on publication date in my search, 98% of the articles selected in Step 4 were published from 2000 onwards and 68% from 2010 onwards. Of the 72 articles on liminality, just 7 were in a management consultancy or similar setting.

I performed a further review of the remaining 84 articles on management consultancy and 72 on liminality. I adopted an inductive approach within the two separate streams of literature, similar to that used by Gioia, Corley and Hamilton (2012). I identified recurring concepts and grouped the articles into what eventually became sub-themes. I then grouped sub-themes into themes within major themes. These themes are shown in Figure 2-1 below:
The first major theme within the literature, on the consultancy-facing role of the management consultants, includes two themes. First the nature of the internal demands placed on consultants by their consultancy. This includes involvement in business development, knowledge management and development and people management and development. The second theme within the consultancy facing role concerns the ways in which management consultancies exercise control over consultants through an elite identity discourse and performance management processes. The second major theme within the management consultancy literature relates to the client-facing role. First, the client’s motivations and expectations when hiring consultants and the different roles the consultant is expected to play in the client-consultant relationship and how they leverage their outsider perspective and expertise. The second major theme within the client-facing role is the relative importance of the reputation of the consultancy in the absence of effective professional
regulation and minimum ethical standards in the consulting industry, and the trust and credibility the consultant is able to build with the client. These themes are relevant to understanding how management consultants navigate the demands of different systems because they provide the context of the relationship with their consultancy and the client.

The major themes emerging from the stream of literature relating to liminality are first, management consultants navigating the relationship with the client. This includes literature that is relevant to the consultant gaining an understanding of the client and the client organisation, identity re-construction related to liminal transition and building a collaborative relationship with the client where they may be regarded as an inside-outsider. The second major theme relates to literature on liminality that is relevant to management consultants moving between the competing systems of their client and their consultancy, and between work and personal systems. The final theme relates to liminality within the consultancy system, between teams and between roles, which is relevant to management consultants being between client engagements and role transition through promotion.

The final step in the selection of literature was a more detailed review resulting in the selection of 79 articles for inclusion in this literature review chapter. These articles were selected on the basis of most relevance to the research question. The articles selected for inclusion are shown by source and CABS (2021) ranking where applicable in Table 2-2 below:
<table>
<thead>
<tr>
<th>CABS Group</th>
<th>Source Title</th>
<th>CABS Rank</th>
<th>No. of Articles</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Management, Ethics, Gender and Social Responsibility</td>
<td>Academy of management journal</td>
<td>4*</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Academy of Management Review</td>
<td>4*</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Administrative Science Quarterly</td>
<td>4*</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>British Journal of Management</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>European Management Review</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Harvard Business Review</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>International Studies of Management and Organization</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>International Journal of Management Reviews</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Journal of Business Ethics</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Journal of Business Research</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Journal of Management Inquiry</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Journal of Management Studies</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Review of Managerial Science</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Scandinavian Journal of Management</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>HRM and Employment Studies</td>
<td>International Journal of Human Resource Management</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>New Technology Work and Employment</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Personnel Review</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Management Development and Education</td>
<td>Journal of Workplace Learning</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Management Learning</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Organization Studies</td>
<td>Culture and Organization</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Human Relations</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Journal of Knowledge Management</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Journal of Organizational Change Management</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Organization</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Organization Science</td>
<td>4*</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Organization Studies</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Organization Dynamics</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Strategy</td>
<td>Strategic Management Journal</td>
<td>4*</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>Accounting Organizations and Society</td>
<td>4*</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Marketing Theory</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>International Political Anthropology</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Journal of Transformative Education</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>GeoJournal</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Anthropology Southern Africa</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td>40</td>
</tr>
</tbody>
</table>

**Table 2-2: Articles in the Literature Review by Source and CABS Rank**


In the next section I present my review of the selected articles using the themes emerging from the literature as the structure and drawing out the connections between the two streams of literature. I begin with management consultancy.
2.3 The consultancy-facing role of the management consultant

In my introduction to this thesis, I proposed that the consultancy-facing role of the management consultant has not been sufficiently researched and the significance and nature of consultancy-facing demands and how they are experienced has not been fully understood. There has been some focus on the management consultant’s consultancy-facing role, but this tends to be implicit with responsibilities alluded to in studies on management consultancy topics such as knowledge management and development and Human Resource Management (HRM) processes adopted by consultancies. In this section I review literature that gives some indication about how management consultants contribute to the ongoing operation and success of their consultancy. I then review literature that provides insight into the ways in which consultancies exercise control over their consultants through identity regulation, and performance and career development expectations. These streams of literature are relevant to understanding how management consultants navigate the demands of different systems because it illuminates the context of the relationship with their consultancy.

2.3.1 The nature of internal demands on management consultants

Some view management consultancy as a growth industry that has been immune from disruption because it delivers specialist knowledge and is agile in developing new offers demanded by clients (Christensen, Wang and van Bever, 2013). However, a consultancy’s growth and survival depends on maintaining profitability through high utilisation of its workforce, the achievement of margins (Bronnenmayer, Wirtz and Göttel, 2016) and the ability of its managers to leverage internal and external networks to explore for new business and knowledge (Rogan and Mors, 2017). Management consultants must therefore maximise their billable hours (Alvesson and Empson, 2008). Business development appears to be an important aspect for management consultants and, whereas this is usually a client-facing
activity, the study by Haas and Hansen (2005) highlights that business development also involves management consultants working on sales bids leveraging existing knowledge and creating new knowledge.

Developing and sharing knowledge from their involvement in client engagements appears to form a major part of the management consultant’s consultancy-facing responsibilities. Ambos and Schlegelmilch (2009) claim producing and sharing codified and tacit knowledge within firms remains a major challenge. They found that consultants often have insufficient time between projects for knowledge capture, leaving them unable to put the required effort into contributing what they know to the learning potential for the firm. Dunford (2000) believes that, rather than fundamental time pressure, problems may be more deeply embedded in cultures where sharing knowledge may be seen as giving away power and influence. Hicks et al. (2009) found that knowledge transfer during client engagements is multi-directional with consultants learning from clients as well. Whether new knowledge is gained through networks or directly from client engagements, Ambos and Schlegelmilch (2009) point out that translating knowledge into service offers to support future client engagements is a key focus for innovation in consultancy and is embedded in the appraisal systems of most consultancies.

As well as meeting targets for business development and developing and sharing of knowledge, the study by Richter, Dickmann and Graubner (2008) on the HRM processes in different types of management consultancies indicates that management consultants are also engaged in recruiting and managing more junior consultants. They are also involved in the skills development of others as well as ensuring their own self development needs are met (Richter et al. 2008; Alvesson and Kärreman, 2007). An important aspect for management consultants is that their consultancy has mechanisms in place to manage, match and develop their professional competencies to support career progression (Six and Sorge, 2008). Trust
is a feature of consultancy, not only the trust between client and consultant (Gluckler and Armbruster, 2003), but also the trust the consultant places in their consultancy firm. Six and Sorge (2008: 857) claim “high trust organisations” create a culture in which relationships are important and show care and concern for the other person’s needs are valued. This is important for consultants who spend long hours on a client’s site, sometimes with sceptical client personnel, under pressure to achieve high standards and deliver high quality work (Alvesson and Robertson, 2006).

The study by Alvesson and Kärreman (2007) highlights that a consultancy-facing responsibility for more senior management consultants is managing the performance and career development of their more junior colleagues. They claim management consultants spend significant amounts of time on what they describe as the excess ceremoniality of the performance appraisal system. They found that HRM practices were replete with feedback mechanisms, and consultants were encouraged to give and seek feedback in all situations which resulted in a large amount of people processing systems and practices. However, they found that management consultants often did not have the time to follow processes and practices properly, feedback was vague and unduly positive and the perception of individuals was that the reasons why some were promoted, and others were not was opaque. Alvesson and Kärreman (2007; 721) conclude that actual practices in management consultancies can fall behind and even contradict ambitious HRM objectives. They claim that management consultants taking the process seriously depends on them believing that complying with the “excess ceremoniality” of HRM practices and processes will enable them to maintain and improve skills and gain control over the achievement of aspirational career goals and their projected identity.
2.3.2 Identity regulation and control by consultancies

One stream of scholarship in the literature has articulated the view that management consultancies project an elite image emphasising creativity, innovation, autonomy, learning and development in relation to work. This is to ensure they recruit and retain the brightest candidates and graduates from the most prestigious business schools (Gill, 2015), and to promote self-discipline amongst existing consultants (Alvesson and Robertson, 2006). However, Costas and Kärreman (2016) point out that an elite consulting identity may not always live up to management consultants’ expectations. They claim consulting work in large knowledge-intensive firms often entails the use of standardised methodologies and implementations and far from finding the work creative, innovative and complex, individuals may find it boring and even de-skilling. Costas and Kärreman (2016) claim that boredom is an outcome of the identity regulation fostered by the company discourses around elitism, expertise, creativity, learning and autonomy. They claim that when consultants encounter boring work, they may develop a “bored self” (Costas and Kärreman, 2016: 62) and that the construction of self as bored allows consultants to both hang on to the aspirational aspects of the identity suggested by company discourse while dealing with its disappointments. Costas and Kärreman (2016: 75) describe this phenomenon as an “arrested identity”. In contrast, Gill (2015) believes that an elite identity may cause status anxiety for consultants who find themselves under pressure to consistently achieve high standards and the potential loss of that status if they fail to do so.

Alvesson and Robertson (2006) claim the nature of consultancy means that control may be accomplished through the self-positioning of employees within managerially inspired discourses with which they become identified and committed. They believe management consultancies actively define their employees as elite and use this shared social identity to promote self-discipline and the desire to accomplish high standards of performance.
However, Alvesson and Kärreman (2007) and Reid (2015) argue that consultancies do not rely solely on managerially inspired discourses and elite social identity to achieve high standards. As expressed earlier, they see performance appraisal as a key driver for consultants. Reid (2015) cites social identity theory when describing strategies consultants employ when deciding whether or not to disclose deviation from expected behaviour and risk becoming a member of a de-valued group. Reid (2015: 1001) found the appraisal process in consulting to be highly subjective and open to exploitation by consultants who are good at “passing” as an ideal worker without doing the work (Reid, 2015: 997). She found that generally speaking, those who embrace the preferred consulting identity by being available at all times and in all places receive good performance ratings whereas those who placed restrictions on their work e.g. client locations, types of project and availability, were generally penalised and received poorer performance ratings (Reid, 2015).

Management consultancy is claimed to be a stressful occupation, consultants often work long unsocial hours under intense pressure to achieve the high standards expected by their consultancy and the client (Alvesson and Robertson, 2006; Gill, 2015). However, Gardner (2012) notes that continuously working under pressure may be counter-productive and claims that high pressure situations, whilst initially enhancing team motivation and performance, may eventually result in performance detracting behaviour such as an over-reliance on general expertise rather than specialist knowledge. Mühlhaus and Bouwmeester (2016) describe consultants coping with stressful encounters through self-categorisation and membership of social groups. They see social identity as a potential source of support for consultants. They believe the pressure to excel, sell-on and show full-time availability makes management consultancy an extreme example of a high-status, high-stress occupation. They observe that self-categorisation as part of an elite social group helps consultants manage their stress and creates a feeling of social inclusion.
Management consultants appear under pressure from their consultancies to develop skills and progress through the grades (Richter, Dickmann and Graubner, 2008). In their study of six major management consultancies Carvalho and Cabral-Cardoso (2008: 340) found that the majority operated an “up or out” or “go or grow” policy where management consultants who found it harder to achieve high-performance levels were usually guided out rather than up the career ladder. They found in some firms the “up-or-out” system was very openly applied, and the performance appraisal process purposefully used to manage people’s expectations in a way that made it difficult to tell when people left strictly of their own accord from when they were steered out. They found in other firms those with performance below expectations were more subtly informed of their waning career opportunities by being given fewer and less interesting projects. Role transition is therefore a feature of management consulting. This includes transition between roles from one client engagement to the next, and also progressing from one grade to the next. Management consultants may find themselves between client engagements when they are deemed to be not working and “on the bench” (Sturdy, Schwarz and Spicer, 2006).

The concept of identity work is relevant to role transitions experienced by management consultants. Sveningsson and Alvesson (2003: 1165) define identity work as “people being engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness”. In his review of identities and identity work in organizations, Brown (2015) suggests that the concept of identity work may provide a useful means of integrating the sociological and psychological literatures on identity. Sveningsson and Alvesson (2003) see identity work as struggle, a process through which people strive to overcome disruption to their self-identity and seek to establish, maintain, or restore a coherent and consistent sense of self. In contrast, Beech et al. (2016) argue that for some, identity struggles may not be transitory but ongoing and unresolved.
This could apply to management consultants experiencing disruption to their self-identity when transitioning between roles from one client engagement to the next. I return to the concept of identity work later in this chapter in my review of liminal identity reconstruction and the relevance to management consultants of the liminal identity work framework defined by Beech (2011).

2.3.3 Summary

The review of management consultancy literature demonstrates that research on the management consultant’s consultancy-facing role is fragmented, interwoven with research on related topics. Nevertheless it seems that whilst management consultants must maximise their billable hours (Alvesson and Empson, 2008) and leverage networks to develop new business (Rogan and Mors, 2017), they must also contribute to the operation and ongoing success of their consultancy by performing internal consultancy-facing responsibilities. These responsibilities include providing input to sales bids (Haas and Hansen, 2005), sharing and developing knowledge (Ambos and Schlegelmilch, 2009) and the recruitment, management, skills and career development of more junior consultants (Richter, Dickmann and Graubner, 2008). This whilst also living up to the elite social identity defined by consultancies to promote self-discipline and the desire to accomplish high standards of performance (Alvesson and Robertson, 2006). This is supported by performance management processes that according to some are open to manipulation (Reid, 2015). Management consultants are also under pressure from their consultancies to develop skills and progress with some operating “up or out” policies when consultants fail to progress at the expected rate (Carvalho and Cabral-Cardoso, 2008). Management consulting appears to be a high stress, high pressure occupation and management consultants may cope through self-categorisation and identifying as belonging to an elite professional group (Mühlhaus and Bouwmeester, 2016). Identification as an elite appears to be actively promoted by
consultancy firms, and that this kind of identification does appear to have a function in maintaining commitment to work even when the reality of the work is less engaging or demanding than expected (Alvesson and Robertson, 2006; Costas and Kärreman, 2016). So, the literature reveals both how consultancies attempt to regulate consultants as employees and how consultants respond to and participate in this. The literature also reveals how the concept of identity work provides a link between identity and liminality.

The literature illuminates the demands placed on consultants by their consultancy system and the need to include how management consultants navigate between these different systems of engagement within the scope of my investigation.

2.4 The client-facing role of the management consultant

In this section I first review literature on the client-consultant relationship. why clients hire consultants, the role the client expects them to play and how management consultants leverage their outsider expertise. I then review academic perspectives on the lack of professional regulation in consulting leading to the individualisation of consulting ethics with consultancies relying on the integrity of consultants in dealings with clients. I explore literature on how this has increased the importance of trust in building a collaborative relationship with the client. The nature of the relationship that develops between the client and the consultant is relevant to understanding the pressures on management consultants and their experiences of navigating different roles.

2.4.1 Client motivations and expectations

There are different perspectives on why clients engage management consultants. According to Sturdy et al. (2009) management consultants are primarily there to legitimise clients’ views. Sturdy (2011) identifies the distinctive feature of management consultants as their
outsider relationship to the client and claims that this provides them with the ability to shape and legitimise ideas whilst lacking the formal responsibility and accountability of managers. In contrast, others claim that consultants are most often engaged to implement change that clients are unable to implement themselves, due to lack of resources or insufficient in-house expertise (Gluckler and Armbruster, 2003). Legitimation may still play a part and Canato and Giangreco (2011:236) encompass both views, describing management consultants as a “locus of experience” and “source of legitimation”. Irrespective of whether consultants are engaged to legitimise views or implement change their presence is likely to be disruptive, although different authors have a range of views as to the extent and nature of this. Clegg et al. (2004:31) describe the presence of consultants as “parasitical, a source of ‘noise’ that disrupts established ways of doing and being by introducing interruptive action into the space between order and chaos”. In contrast, Furusten, (2009) argues that management consultants improvise and in doing so act as agents of stability rather than agents of change or legitimation, empowering organisations with tools to deal with their uncertainty, and indirectly giving them time and energy to explore and exploit their core processes. Working with the client and other suppliers may accentuate power relationships and there is a risk of specialist knowledge, different ways of working and even different agendas, preventing progress (Levina and Orlikowski, 2009). This may be avoided to some extent through strong client sponsorship (Gluckler and Armbruster, 2003).

Another reason to engage consultants could be to implement the latest management fad or fashion. Management consultancy is heavily criticised for cashing in on or even generating management fads and fashions with some scholars seeing the outputs of management consultancy as “a self-interested exercise in commodification” (Collins, 2004: 555). David and Strang (2006) point out that business publications and general media both reflect and are causally implicated in the demand for fashions such as Total Quality Management.
(TQM). Furthermore, Whittle (2008) provides evidence to suggest, far from generating fads and fashions, consultants often re-interpret and re-articulate management fashions in line with their own agendas, exploiting new income opportunities without making any real change to existing service offers. David and Strang (2006: 216) point out there are risks for clients. They claim management consultancy is a weakly professionalised field with no institutionalized credentials and few protections for clients when it comes to selecting appropriately qualified consultants. They observe that during the “fashion boom” of Total Quality Management (TQM) many generalist consultants entered what is a specialist field. They claim implementations by these generalist consultants were often technically weak and expected benefits were not realised. When TQM discourse moved out of the major management publications followed shortly afterwards by “fashion bust” the hype was over and TQM returned to its specialist roots (David and Strang, 2006: 216).

The concept of consultants as organisational outsiders leveraging outsider knowledge and expertise may help to understand how clients and consultants interact (Sturdy and Wright, 2011). In her study of independent consultants Fenwick, (2007) found that a lack of clarity experienced by the client may result from complexifying detail that obscures their view, and that can be relieved in part through the outsider’s perspective. Sturdy and Wright (2011) see consultants as innovators, enabling the flow of new ideas across organisational boundaries. They claim that in comparison, internal consultants and managers often experience problems, struggling to introduce new ideas, because of their status as organisational insiders. Internal consultants and managers often work collaboratively with external consultants (Sturdy and Wright, 2011). This may result in a productive consultant-client relationship provided the internal consultant has legitimacy and credibility as an internal expert with “boundary-spanning networks” (Sturdy and Wright, 2011: 500). This enables
the consultant and client to leverage relationships that facilitate power sharing and the ability to confront challenges if things do not go exactly to plan.

Bourgoin and Harvey (2018: 1621) found management consultants, as perceived outsider experts, have the difficult task of maintaining their professional image while adjusting to new settings and seeking information to become effective from day one. Bourgoin and Harvey (2018) interpret this as “learning–credibility tension”. They claim that, in order to reduce the anxiety associated with learning–credibility tension, and support their relationship with client, management consultants must employ tactics vital to those who work in different settings and negotiate new, boundary-spanning relationships. These tactics include leveraging available knowledge resources to appear competent, using language and borrowing internal insights that resonate with the client and producing knowledge objects to display productivity. Bourgoin and Harvey (2018) found that, although consultants have to learn on the job, if they reveal this too much to the client, they risk losing credibility. They found the intensity of learning-credibility tension varied. Assignments that were clearly bounded replications of past projects, were less demanding. Complex projects with greater interdependency with the client often came with political exposure and much more pressure on consultants during client interactions. New consultants experienced a lack of credibility more acutely than experienced practitioners.

2.4.2 Reputation, trust, and credibility in the client-consultant relationship

The absence of effective professional regulation in management consultancy means there are no defined standards or binding ethical guidelines (Gluckler and Armbruster, 2003). The Institute of Management Consultancy (IMC), subsumed into the Chartered Management Institute in 2005 because of declining membership numbers, is the professional body for the consultancy profession in the UK (Butler and Collins, 2016). They offer a chartered
qualification as a way of setting standards, but the qualification is not compulsory (CMI, 2021). The lack of effective professional regulation in the management consulting industry is reflected globally (Kirkpatrick, Muzio and Ackroyd, 2012). There have been some high profile ethical lapses in management consultancy, such as the collapse of energy company Enron in 2001 where McKinsey were shown to have clear conflicts of interest that “blinded the consultancy to any potential red flags of the pending Enron fraud and collapse” (Krehmeyer and Freeman, 2012: 488). However, Gluckler and Armbruster (2003) claim leading consultancies have resisted efforts to introduce uniformity and professional status measures, and reject the idea of membership of professional associations. McKenna (2001) claims this resistance to professionalization is because large consultancies prefer to use their own, widely recognized brand reputation for differentiation purposes. O’Mahoney (2011) claims that the absence of professionalization has resulted in responsibility for ethical standards in management consultancy becoming individualized with management consultancies relying on their consultants to handle ethical issues. He argues that individualized ethical responsibility is incapable of preventing malpractice in the face of institutional commercial conflicts of interest between consultancies and their clients. For example, O’Mahoney (2011) found that, where consultancies have provided codes of ethical practice for their consultants, nowhere does it say the consultancy will not recommend its own IT over superior versions elsewhere. Greiner and Ennsfellner (2010) question whether adequate training is provided for consultants to handle ethical issues, beyond the aspirational values of their consulting firm. They see consultants operating in a dynamic environment where the values and rhetoric of their consultancy may serve as guidelines, but often fall short of addressing the most complex ethical issues. They claim this puts additional pressure on the professional identity of the consultant and relies on their individual interpretation of professional standards.
In the absence of institutionalized credentials and few protections for clients when it comes to selecting appropriately qualified consultants, Gluckler and Armbruster (2003) argue that it is hardly surprising that a key driver of competitiveness in consulting is neither price nor measurable quality but experience-based trust. Trust and the degree of client satisfaction is often the product of a strong relationship that develops between the client and the consultant carrying out the work (Momparler, Carmona and Lassala, 2015). Many agree that trust is the most important and critical issue in the client-consultant relationship and that the relationship with the client required for success is that of trusted advisor, always proactive and responsive to clients’ changing needs (Nikolova, Möllering and Reihlen, 2015). Mayer, Davis and Schoorman (1995: 712) define trust as:

> the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party.

This definition of trust is applicable to a relationship with another identifiable party who is perceived to act and react with volition toward the trustor. Trust granting is relevant here in what Nikolova, Möllering and Reihlen (2015) define as a leap of faith. They claim that once the client comes to regard the consultant as a trusted advisor the relationship becomes less formal, and a close working relationship may then develop. Some claim that the exchange of knowledge between client and consultant involves benevolence trust, defined as trustworthiness, care and honesty, between knowledge providers and recipients. (Sankowska and Söderlund, 2015). Ko (2010) claims that benevolence trust, based on the emotional bond between client and consultant, is critical to project success whereas trust based on the competence of the consultant is not.
2.4.3 Summary

In this section I reviewed literature on the client-facing role of the management consultant which is relevant to management consultants navigating between competing systems. I found contrasting views on why clients hire consultants. This may be to legitimise ideas, provide expertise, disrupt, stabilise or simply to implement the latest management fad or fashion. The literature also offers insight into how management consultants negotiate new client settings, leverage their outsider expertise, and combine knowledge with the client to make progress whilst being selective in how much they reveal that they are learning on the job. Many recognise that the lack of regulation and absence of defined standards in consultancy is problematic as it places more pressure on the ethical standards and integrity of the individual consultant. There is a consistent view that trust is therefore a key component of the client-consultant relationship and a belief that experience based trust of clients in consultants is a key driver of competitiveness beyond brand quality and even price.

In a more general context, protagonists of liminality such as Szakolczai (2017) argue that the concept of liminality is now increasingly used in the social sciences, and is about to become a master concept. Horvath, Thomassen and Wydra (2015: 14) claim that “liminality is a powerful tool of analysis…a prism through which to understand transformations in the contemporary world.” Antagonists of liminality argue that the liminality paradigm has detached from its original theoretical framework and, in the absence of the cultural matrix informing its original usage, has become ‘free floating’ and pervasive. Also, that transgression or subversion, and creativity are generally valorised at the expense of social norms, institutions, and structures (Stephenson, 2020). Horvath et al. (2015) apparently aware of the criticism, emphasize the importance of boundaries and limits. They insist that boundary transgressing should not be celebrated as a necessary aspect of any kind of progress and such attitudes should be questioned and problematized.
There are a number of specific criticisms concerning the ways in which liminality has been used in the management and organizational studies literature that may highlight some areas of weakness. One such criticism is that liminality has been diluted and down-played from its anthropological definition as a three-stage, ritual-based rites of passage (Van Gennep, 1909. Cited in Van Gennep et al., 2019) to refer to almost any “betwixt and between” moment (Thomassen, 2015). Victor Turner is widely credited in the literature with discovering the importance of liminality in the 1960’s and recognising that liminality served not only to understand the importance of in-between periods but also to understand human reactions to liminal experiences (Turner, 1967, 1969). However in his later work just prior to his death in 1983, Turner himself suggested that liminal experiences in modern societies had largely been replaced by “liminoid” moments, experiences that are optional and lack the key transitional feature of liminality (Turner, 1982). A further related criticism of liminality, and further evidence of the trend away from the concept’s anthropological definition, is the increasing tendency to interpret liminality as a permanent rather than transitional phenomenon (Johnsen and Sørensen, 2015). This is also in sharp contrast to the idea of a three stage rites of passage under the authority of a master of ceremonies (Turner, 1967, 1969). Nevertheless, there remains a broad stream of opinion in management and organization studies that liminality is a temporal and transitional phenomenon and occurs when something happens that is both exceptional and experiential, something that is gone through, and where there is a sense that a boundary has been crossed (Stenner, 2017).

Conceptions of liminality have become popular in theorising areas of social and organisational life. However, a common problem is that across them there is no clear conceptualisation of what it is to be belong to a group or organisation, and therefore what it is to be betwixt and between. Some organisations studies literature claims that organisations
promote a sense of belonging by making employees feel insecure and even isolated (Alvesson and Willmott, 2002). Swan, Scarbrough and Ziebro (2016) claim that managers are liminal within their organisation. All this implies organisational belonging may be ambiguous. The liminality literature tends to focus on the sense of belonging, and sometimes abandonment, of those “betwixt and between” in the liminal phase rather than their experiences of belonging before or afterwards (Czarniawska and Mazza, 2003). As organisations become more flexible, employees more substitutable and change more continuous, it could be argued that any social or organisational experience may be seen as liminal, because most social actors in any context are partially included with some others and excluded by still others (Sturdy, Schwarz and Spicer, 2006; Beech, 2011). Despite these potential conceptual shortcomings of liminality, it does appear to be a useful lens through which to illuminate liminal lived experiences. I now explore these different views of liminality in more detail.

2.5 Liminality

In this section I first examine liminality as a concept and its development from Van-Gennep through to more modern conceptions. I then review literature that is relevant to the process of consultants engaging with clients and the liminality of the client-consultant relationship. I then review perspectives on the liminality of those such as management consultants who work between organizations, the different types of liminality they may experience and how this differs from traditional anthropological perspectives of liminality. I review literature on liminality between roles, both within the consultancy career development system and between client-facing roles. I then review literature on liminality between work and personal systems of engagement with particular attention to the impact on management consultants of flexible working and the requirement to travel. Finally, I review literature that provides
insight into experiences of liminality within the consultancy system, between teams and between roles.

### 2.5.1 The concept of liminality

In his book *Les Rites de Passage* Van Gennep (1873–1957) defined liminality as the transition between different social groups, life stages, occupations or environments. He proposed a conceptual classification of all existing rites distinguishing between rites that mark the passage of an individual or social group from one status to another from those that mark transitions in the passage of time for example, harvest, New Year. Van Gennep singled out rites of passage as a special category (Van Gennep, 1909, cited in Van Gennep et al., 2019). He claimed that rituals marking, helping, or celebrating individual or collective passages through the cycle of life or of nature exist in every culture, and share a specific three-fold sequential structure. The transition starts with the rites of separation, continues with the middle, and central, phase, the “passage” itself, involving a genuine performance or trial, and ends with the rites of re-aggregation celebrating the successful completion of the transition. The middle stage implies an actual passing through the threshold that marks the boundary between two stages, and the term “liminality” based on the middle stage was introduced in order to characterise this passage. The word “liminality” is derived from the Latin “limen” (threshold), and simply meant a situation in which, in order to facilitate a “passing through”, ritually and temporarily all limits were removed. As a consequence, the very structure of society was temporarily suspended (Szakolczai, 2009: 142). These stages in liminal rites of passage are shown in Figure 2-2 below:
Figure 2-2: Stages in Rites of Passage

(Adapted from Szakolczai, 2009)

In the 1960’s the rites of transition associated with Van-Gennep’s work began to be noticed by anthropologists such as Victor Turner. He recognised the relevance of the rites of transition and liminality to his own experience during the early 1950’s when he lived among the Ndembu in Zambia (Turner, 1967). In his book the Ritual Process (Turner, 1969) he was able to translate his experiences of the rites and rituals of the Ndembu, which were rooted in symbols, witchcraft and sorcery, into Western perceptions. Turner extended Van-Gennep’s work, adapting the three-stage process of transition so that the ritual moment was more optional in less bounded and more secularised societies.

In later work, Turner (1982) continued to downplay the ritual element of liminal transition. He proposed that in modern society, liminal experiences structured around rites of passage coexisted with liminoid activities which were outside the rites of passage structure. He described liminoid experiences as optional breaks from normality that did not involve transition and were not perceived as anti-structure, often related to leisure activities such as: literature, drama, and sport. He claimed that ritual had given way to individualism and rationalism and the transitional flow experience had been pushed into tribal culture.

Thomassen (2015) interprets Turner’s version of liminality as applying to any “betwixt and between” moment relating to space or time. He argued that Turner’s claims went too far, and that delimiting liminality in this way ignores its possible existence in political and social transformations. Szakolczai (2017: 232) argued that by limiting the term liminality to small-
scale “tribal” societies, claiming that more advanced societies only have “liminoid,” or liminal-like, and not properly liminal situations, Turner was assigning an almost exclusively positive sense to the term liminoid.

Turner, (1969) defined liminality as a feeling of being neither here nor there, a sense of marginality and a deep and painful loss of identity. He emphasized the collective nature of liminal experiences, a shared sense of marginality and loss, which results in intense solidarity and togetherness. Those sharing the liminal space would usually become a close, egalitarian and familial community, which Turner termed communitas or anti-structure, a sense of other that exists as an anti-structure, alongside formal structures. He claimed that communitas temporarily liberates humans from the limiting ties of institutionalized, abstract social norms, replacing them with something that is more “spontaneous, immediate and concrete” (Turner, 1969: 127).

Edith Turner (2012) extended Victor Turner’s work, arguing that communitas is the very basis for organizing and working together. She claimed that organizational habits, structures, and rules of behaviour would eventually develop and work well, if they remain on the human level allowing the embers of communitas to survive. According to Buechner et al., (2020) transformative liminal experiences create a shared sense of marginality amongst displaced workers which results in intense solidarity and togetherness. Vesala and Tuomivaara (2018) claim that the temporary nature of the work environment and new configurations of workmates heighten the intensity of the experience. This is relevant for management consultants working together on client site, sometimes staying away from home. Toraldo, Islam and Mangia (2019) claim that managers might use communitas to exercise control over or even exploit team members by reframing work as communitas, using rhetoric such as togetherness and solidarity to increase productivity. Meira (2014) claims that communitas is structurally integrated to the social system by exclusion and that liminal organization is
conducted by contradiction to the social system. When these contradictions begin to be eradicated, communitas evolves and is eventually replaced by social structures. Meira (2014) found, in his study of displaced workers, that the sense of marginalisation and sacrifice, and the fight to create a co-operative to avoid unemployment, created a sense of solidarity and a communitas where liminal subjects were equal. He claims the turning point was the embodiment of rules, the recognition of difference in authority levels, and punishment of deviants. However, Edith Turner (2012) claims that if anti-structures become overly law-bound, communitas will bubble up again from below and question the rule-bound systems that have come into existence.

As mentioned at the end of the previous section, when considering experiences of liminality within mainstream organising, the broad scholarly opinion is that liminality occurs when something happens that changes things, a trigger, perhaps an event that is both exceptional and experiential, something that is gone through, where there is a before and after and a sense that a boundary has been crossed (Stenner, 2017). When considering the transitional process of liminality, Söderlund and Borg (2017: 7) refer to liminal “triggers” which may be compulsory or voluntary. The idea of compulsory triggers aligns with the anthropological view of liminal transition based on ritual (Van Gennep et al., 2019). The idea of voluntary liminal transition is more in accord with Turner (1969) who recognised that the ritual moment was more optional in less bounded and more secularised societies. This interpretation has been extended further in more recent studies. Stenner (2017) claims that liminal transition may be fabulated, in the sense of being devised, staged and tame, or spontaneous in the sense of being found, un-staged and wild.

In the literature reviewed so far, there is a tension between conceptions of liminality as a temporal and transitional phase and as a continuing or permanent state of being ‘betwixt and between’. The anthropological conception of liminality is that it is temporary and transitional
Some argue that any idea of liminality becoming permanent that would bring that very liminality to an end (Sturdy, 2004). Szakolczai (2000, cited in Thomassen, 2015) claimed liminality may be a permanent phenomenon. He argued that this could occur in any of the three stages of the rites of passage of separation, liminality and re-aggregation where liminaries become frozen as if a film has stopped. Szakolczai proposed monks as an example of preparing endlessly for rites of separation, the central liminal passage as individuals in court society who perform an endless ceremonial role, and Bolshevism as an example of a society stuck in the final stages of ritual rite of re-aggregation.

Szakolczai, (2017) describes a negative form of permanent liminality where change becomes accelerated and taken for granted and any effort to achieve stability becomes impossible. He claims that participants in this negative form of liminality have forgotten how it was when things were stable and feel trapped. Szakolczai (2009) claims that this creates an opportunity for tricksters, defined by anthropologists as obscure, ambivalent shadowy figures, who stand outside of the group, incapable of close, emotional involvement and only interested in maintaining liminality so as to gain influence under conditions of confusion and distress. Thomassen (2014) claims that permanent liminality without masters of ceremony to orchestrate re-aggregation with a stable state can easily lead to long term rule by tricksters who thrive on disorder and division. Tricksters may be mistaken for charismatic leaders and takeover. Szakolczai (2009) identifies historic figures such as Hitler, Mussolini, Lenin and Stalin as tricksters. In modern times, Hackley, Brown and Hackley (2012: 463) see Simon Cowell as a trickster. They liken the reality television phenomena of X Factor to a liminal ritual where viewers gain perverse pleasure in watching the “ritual humiliation of desperate but talentless auditionees”. They see Simon Cowell orchestrating a mass-media experience of existential liminality.
Others conceptualise liminality as a revolving doorway, rather than a threshold, for those who regularly find themselves in liminal situations. They claim that this coheres with the notion of permanent liminality (Bamber, Allen-Collinson and McCormack, 2017). However, the traditional anthropological interpretation of liminality is that it is temporal and transitional (Van Gennep et al., 2019). In Turner’s earlier work (Turner, 1969) he proposes liminality as anti-structure a transitional space lacking fixed points, the origin of structure and point of departure for the birth of new forms of cultural and social life. In those terms any argument for permanent liminality seems paradoxical. Turner (1969: 145) observed that despite Francis “compelling the friars to inhabit the fringes and interstices of the social structure of his time and keeping them in a permanently liminal state” the Franciscan Order eventually developed structural continuity and ceased to be liminal. This suggests that liminality that may appear to be permanent is actually temporary when viewed over a longer timescale, resolved in time by re-aggregation. The tension and apparent contradiction between ideas of temporal and permanent liminality is an unresolved issue in the literature, and I will investigate empirically which kind or kinds of liminality are relevant to management consultants.

2.5.2 Navigating inter-organizational relationships

Learning about the client

In my review of management consultancy literature I examined claims that management consultants experiencing “learning–credibility tension” when they negotiate new boundary-spanning relationships (Bourgoin and Harvey, 2018; 1621). There does not appear to be scholarly literature on liminality directly about the process of consultants’ initial engagement with clients but there is other literature that may be relevant. The process of management consultants learning about the client and the client organisation may be seen as having some
similarities with that of Business and Management undergraduates learning about leadership. The contexts are different – students on a course compared to paid professionals on a new site – but there are similarities in terms of the need to grapple with unfamiliar concepts or explicit knowledge and bring these into relationship with tacit understandings and a sense of having sufficient competence to engage with something previously unfamiliar. Hawkins and Edwards (2015) claim the experience of gaining knowledge involves liminal transition between not knowing and knowing. They claim that those able to master threshold concepts that lead to deeper understanding and a transformed sense of self as someone who has learned, experience liminal transition. They liken the transition between not knowing and knowing to a liminal ritual where the learner grapples with emotions such as doubt and uncertainty as symbolic monsters with which they must come to terms to progress through the liminal phase. Irving, Wright and Hibbert (2019) in their later study of leadership undergraduates emphasize that it is the negative rather than positive emotions that facilitate entry into and progression through liminal transition but that emotions such as panic, or lack of focus may cause the liminal to become stuck within liminal space. This has implications for management consultants who face anxiety about being seen to be competent and knowledgeable and have to overcome doubts as to how they are being perceived.

Hay and Samra-Fredericks, (2016) offer a different perspective. They found that part-time doctoral students dealing with threshold concepts in becoming researchers coped with “monsters of doubt” by gaining support from others in the liminal space, such as supervisors, drawing on previous experience, or bracketing by setting aside other obligations to family and work. This is similar to management consultants transitioning back and forth between their consultancy and the client, working long hours striving to be the ideal consultant. Hay and Samra-Fredericks, (2016) claim the journey of becoming a researcher was made more difficult as students were never completely separated from previous ways of being since they
moved back and forth between the unfamiliar classroom context and familiar workplace and home contexts over a prolonged period of time. They claim that while liminality is conceptualised as a linear, movement between separation, transition and incorporation for part time students was not linear. The fluctuating conditions between separation and transition amplified struggles of identity incoherence associated with liminality and allowed the pre-liminal to leak into the liminal space.

**Balancing inside-outsider tensions**

I reviewed management consultancy literature that helps to understand how consultants are able to leverage their outsider perspective and expertise in the client-consult relationship (Fenwick, 2007; Sturdy and Wright, 2011), whilst also working collaboratively and productively with internal consultants and managers, leveraging their legitimacy and credibility as an internal expert with “boundary-spanning networks” (Sturdy and Wright, 2011: 500). In their study of how professional emotional labour is enacted in consultancy Iszatt-White and Lenney (2020) claim management consultants are able to leverage their liminal position and temporary position of power with the client. They see a gap between what is actually said to a defensive and resistant client, and the emotions the consultant is experiencing. So, whilst expressing compassion and empathy to the senior client the consultant experiences frustration at what they perceive as the client’s inadequacy and incompetence. However, the consultant wants their message to be heard without pushing the client into an even more defensive and hence unproductive position. Iszatt-White and Lenney (2020; 16) claim this requires the ongoing performance of emotional labour by the consultant, playing with liminality through use of language, shifting role positions to meet whatever they perceive is needed to gain the client’s co-operation. They may represent themselves in different ways, from outsider, describing themselves as “experienced consultant”, “objective academic”, to insider, “ex-marketeer”, “commercial man” and even
neutral as an “ally” of the senior client or “champion” of the workforce, who the consultant felt deserved a better leader.

Borg and Soderlund (2015: 188) claim that when mobile project workers embrace their role as “inside-outsiders”, they also begin to reflect on their work role more broadly. They argue that mobile project workers develop a reflexive ability that associates their knowledge necessary to complete the project with assimilating new perspectives and the ability to question, review, evaluate and investigate the problem from an altered perspective that is capable of overcoming the status quo. Sturdy et al. (2009) suggest that, rather than being an inside-outsider, management consultants experience themselves as continuously crossing liminal boundaries between their consultancy system, and outsider status, and the client system where at times they are regarded as more of an insider. They go further and argue that the idea of outsider status and cognitive distance, with consultants able to see the client’s problems more clearly, may overestimate the novelty of the knowledge consultants bring and the cultural distance implied by clients and consultants seen as embedded in different systems. They also claim that the emphasis on cognitive distance may underestimate the closeness and personal ties that can develop between the consultant and the primary client. All this suggests that, whilst management consultants experience themselves as liminal in various ways, they also make judgements about whether and how to present themselves as more in one position or another.

Liminal Identity reconstruction

In the review of management consultancy literature, I examined claims that management consultancies project an elite identity image in relation to consultancy to promote self-discipline and the achievement of high standards amongst consultants (Alvesson and Robertson, 2006; Gill, 2015). Notions of identity also appear relevant for the liminal
transition of consultants engaging with the client and client organization. Beech (2011) associates liminality with identity work which emphasizes a set of processes through which people construct and re-construct their distinctive self-identity i.e. how we present ourselves, and our social identity (Sveningsson and Alvesson, 2003). He claims that liminal practices occur at the intersection of structure and agency and help us to understand the mutual construction of self-identity i.e. how we perceive ourselves as being perceived by others. Beech perceives liminality as dialogic identity re-construction through the liminal practices of experimentation, reflection, and recognition, as shown in Figure 2-3 below:

![Figure 2-3: Liminal identity work framework (Beech, 2011)](image)

Beech (2011) proposes under conditions where individuals are affected by organisational change, the first stage of liminal identity re-construction is experimentation where versions of the self are tried out. He sees this as an inside-out dialogic orientation. This is followed by dialogic two-way interplay and the liminal practice of reflection. Finally, there is an outside-in dialogic orientation through the liminal practice of recognition when the liminar reacts to an identity that is projected onto them. Ellis and Ybema (2010) challenge the notion of those performing in-between positions, such as management consultants, ever reaching the final recognition stage of their re-constructed identity. They argue that those who transcend organizational boundaries, switching between in and out, crossing and stretching boundaries on their own terms, are permanently liminal and use liminality to preserve their own professional identity by developing a more permanent liminal identity. In contrast, in
their study of public relations professionals, Reed and Thomas (2019) argue that liminality plays the paradoxical role of sustaining rather than disrupting a sense of self, a discursive resource that facilitates the formation of professional identity and a legitimate sense of self as someone who is able to reformulate identities on a continual basis, in relation to their social situation. Nevertheless Beech (2011) claims that liminality disrupts identity and this may be problematic for those who do not reach the final recognition stage of their re-constructed identity. He claims that in traditional liminality the ritual serves to constrain uncertainty in time and space, and this lowers the associated stress. In contrast, the natural stress of a liminal situation is heightened when the process itself is ambiguous and uncertain because the three phases of separation, liminality and aggregation are not all in evidence, as in Beech (2011). The claims of Reed and Thomas (2019) and Beech, (2011) are in sharp contrast with each other. One is concerned with the possibilities and potential of an identity being flexible, the other with the need for reaggregation or reformulation of a stable identity. This has implications for the research and the importance of understanding how management consultants experience and cope with the disruptive impact of liminality on their professional identity.

2.5.3 Liminality between systems of engagement

Liminality between client and consultancy systems of engagement

In their review of literature on liminality and organising, Söderlund and Borg (2017: 15) define three types of liminality relevant to those working individually or collectively between organisations. First is “positional” liminality. They claim this relates to those, such as management consultants on a client engagement, operating between organizational boundaries, experiencing the difficulties of being a liminal persona and developing the competence to cope with and benefit from their liminal position. The client, hosting those
from outside their organization, may also become liminal. Many see liminality as a key characteristic of the client-consultant relationship and management consultants as enabling knowledge flows between organisations (Sturdy et al., 2009). Czarniawska and Mazza (2003: 267) use the metaphor of consulting as a liminal space and describe consultants as “allies of management, in temporary positions of power where usual practice and order are suspended and replaced by new rites and rituals”.

Sturdy et al., (2006: 929) describe liminality as facilitating change, “a fluid and unstructured space … which is both unsettling and creative”. They describe business meals with clients as liminal spaces where many of the rituals of the organization are suspended or lessened and replaced by the rituals of eating and socializing. They see such liminal spaces being used tactically to pursue the politics of organizational change by more informal means, where perhaps certain people are invited to engage in these rituals while others are not. Sturdy et al. (2006) claim that different degrees of liminality may be achieved depending on the location and time of day. Meals held on-site during the day are closer to the daily work activity and norms than dining in the evening at a restaurant or home. Borg and Söderlund (2015: 275) offer a different perspective. They argue that liminal competence is important for mobile project workers to successfully avoid or handle the potential negative consequences of their liminal work conditions. They found that those at the highest level of liminality competence see “work as knowledge transfer”. thrive on mobile and transient work conditions, actively making use of their belonging to different organizations by participating in different activities and taking on roles in both organizations, increasing their social networks and deliberately using liminality to broaden their knowledge. In contrast they claim those at the lowest level of liminal competence see “work as assignment handling” and try to reduce their degree of liminality and even attempt to completely avoid it by seeking out more stable, longer-term assignments. They enjoy working as consultants
because of the work content but suffer more from the weakened belonging that comes with their liminal position.

The second type of liminality defined by Söderlund and Borg (2017) is “spatial” liminality associated with individuals working in specific places, between workplaces, on the way to work, or working in non-traditional physical work contexts coping with competing values and institutional logics. Management consultants spend much of their time on client site, which for them may be regarded as a liminal space (Sturdy, Schwarz and Spicer, 2006). However, they may still need to seek out what Shortt (2015: 654), in her study of hairdressers, interprets as “transitory dwelling spaces”, liminal spaces such as store rooms, stairways and corridors, away from the client. This may be to escape organizational tensions, to gain inspiration, to socialise or simply for privacy to conduct non-client business (Shortt, 2015). Although the idea of spatial liminality is usually related to a physical space, in their study of home-based on-line entrepreneurs, Di Domenico, Daniel and Nunan (2014) conceptualise mental mobility as involving a process through which individuals navigate liminality between physical and digital spheres of work suggesting that “spatial” liminality may also relate to the liminar’s mental state.

Finally, there is “temporal” liminality, associated with a passing, transitional and temporary condition. Söderlund and Borg (2017) claim that individuals in the transitional stage between one stable structure and another must handle the pressure and tensions arising from identity formation and re-formation and how provisional identities are developed as part of the liminal experience. Ybema, Beech and Ellis (2011: 21) provide further insight on this temporal aspect of the liminality of those who operate between systems. They differentiate between “transitional liminars” who experience transformational change between one identity to another in the traditional, time constrained sense of liminal transition, and perpetual liminars who, much like management consultants, operate between two identity
positions for a prolonged period of time. They claim “transitional liminars” abandon old identities and construct new identities whereas “perpetual liminars” respond to conflicting loyalties and obligations by constantly switching from one identity to the other, oscillating between being close to and distant from others, whilst remaining in-between all the time. They argue that being a perpetual liminar is both a problem and an opportunity. Perpetual liminars must cope with working on and between the notional boundaries that require them to navigate incompatible and sometimes conflicting obligations. Stepping across organisational, professional or hierarchical thresholds on a day-to-day basis, they constantly cast and recast themselves for different audiences at different times, establishing and maintaining multiple relationships. Ybema, Beech and Ellis (2011: 25) argue that perpetually liminal actors thus inhabit a social 'no man's land', a positioning they use as an operating base from which to build allegiances. They see such perpetual liminars as “boundary bricoleurs” who constantly switch their identifications by crossing and drawing lines of demarcation.

A number of studies have further explored the non-linear nature of liminal experiences of those who work between or across organisational boundaries. These contrast with the linear conception of liminal transitions, starting with rites of separation followed by liminality and re-aggregation to a new transformed state (Szakolczai, 2009). In a study of overnight prison visitors, Moran, (2013) found that liminality of long-visit suites may be static rather than transitional and non-linear rather than linear. Prison visitors do not re-aggregate with a transformed state, they return instead to their pre-liminal state. Similarly, Sturdy and Wright (2011) see consultants acting as masters of ceremonies, orchestrating liminal transformational change for the client, but not themselves re-aggregating with the client organisation. Ellis and Ybema (2010) take the concept of non-linear liminal transition further. In their study of supply chain managers, they claim that managers were in a
permanent state of liminality, discursively marking shifting boundaries that variously positioned themselves, and their colleagues, competitors, customers and suppliers, as organizational insiders or outsiders, depending on the situation. Construction and re-construction of identity for management consultants may therefore be multi-directional as they transition between client-facing and consultancy-facing identities. In the context of the Söderlund and Borg (2017) review, it could be argued that liminality for management consultants on client site, transitioning between client and consultancy demands, is multi-directional and also multi-dimensional in that they simultaneously experience positional, spatial and temporal liminality.

**Liminality between work and personal systems of engagement**

I have so far explored ideas of more or less permanent liminality in terms of how management consultants relate to different organisations. However, others have written about their wider experiences of liminality, including how they handle the boundary between home and work. The pressure for management consultants to be available at all times and in all places to receive good performance ratings (Reid, 2015) has led some to introduce the notion of management consultants being in a permanent state of liminality. Johnsen and Sørensen (2015: 335) describe management consultants as permanently suspended between work and personal life in a “zone of indistinction”. They claim management consultants are in a paradoxically permanent state of liminality, trapped in a threshold world between work and life, having a life besides work but discarding any idea of work–life balance. The study by Canibano (2019) into flexible working by management consultants has some relevance here. The idea of flexible working in consultancies has been presented as controversial in the past as it is more often interpreted as management consultants being flexible towards the firm and reinforces gender divisions (Donnelly, 2015). However, in her study of flexible working in a global consultancy, Canibano (2019: 445) found that whereas there may appear
to be “paradoxical tensions” in approaches of employee or employer centric flexibility, they can co-exist as employee-focused practice that enables employees to make choices about their work arrangements as an inducement and genuine contributor to work–life balance, whilst demonstrating flexibility as a contribution. Whereas contribution meant being available, adaptable, and mobile in terms of where and when they worked, there were times when management consultants were able work from home and be flexible about their working hours, as long as the work got done. In practice this meant being able to take a child to school in the morning whilst being available to take a call at 10pm. Nevertheless, Canibano, (2019) found that consultants were able to manage the tensions between contribution and inducement and, in contrast to Johnsen and Sørensen (2015), they were able to construct a work-life balance that worked for them.

In their study of a work camp based in an oil field, Dorow and Jean (2021) found, much like a consulting engagement, the work camp is a liminal organization with its own internal routines, rhythms, and rules, a temporal liminal space. They found that those required to stay on rotation for two weeks between visits home experienced feelings of monotony, disorientation and entrapment. They also developed an abnormal focus on future goals such as early retirement, and the high pay they received, which they saw as offsetting the sacrifice of family and personal time. Dorow and Jean (2021) claim that workers suffered mental exhaustion and anxiety, in part as a consequence of spending an extended period of time in a liminal state, albeit what they describe as the ‘revolving door’ variety of liminality.

Travel and commuting are an important part of the experience of management consultants as they move between different systems of engagement, and there is existing research that sheds light on this. In her study of commuters, Wilhoit, (2017) concludes that journeys are paradoxically both liminal and routine. Liminal because it is a time and place that does not belong to work or personal systems. Routine because although journeys have an element of
uncertainty for example, if there are delays, commuters eliminate the uncertainty through performative acts such as taking the same route, the same train and introducing their own structure of activities. Wilhoit, (2017) argues that whereas liminality is uncertain and in-between and not inherently beneficial, commuters found commuting beneficial and meaningful, offering possibilities not available at other times. In contrast, in their study of subjects with international careers, Daskalaki, Butler and Petrovic, (2016: 192) frame liminality as a permanent phenomenon. They claim that liminality is not a condition that the subject strives to eliminate to find relative fixity and permanence. They argue instead that liminality is an unbounded, disorderly transformation and that individuals who regularly travel between locations experience inter-spatial and inter-corporeal liminality, continuously constructing a sense of self and a series of “identities on the move”. They describe liminars, such as management consultants, as boundary dwellers where boundaries are lived conditions and what is inside and outside is constantly negotiated, emergent, and blurred. As a result, liminal spaces are never linear and uncontested but polycentric, multi-dimensional and ambiguous sites of un/becoming. This implies that management consultants live on the boundary of an expandable and contractable sphere of existence, in a state of permanent liminality, where consultancy systems, client systems and personal systems are allowed in or excluded at different times.

2.5.4 Liminality within the consultancy system

Liminality between internal teams

In my review of management consultancy literature, I reported that management consultants must perform internal consultancy-facing responsibilities such as input to sales bids (Haas and Hansen, 2005), sharing and developing knowledge (Ambos and Schlegelmilch, 2009), and the recruitment and performance and career development management of more junior
consultants (Richter, Dickmann and Graubner, 2008). Management consultants must therefore participate in multiple internal teams. Swan, Scarbrough and Ziebro (2016) claim that the concept of liminality is relevant even for management groups within an organisation and does not depend on working across organisational boundaries. This implies that management consultants are not only liminal between the competing systems of their client, consultancy, and personal life but also within their consultancy system. This has implications for the empirical research and understanding the liminal experience of how the consultancy-facing role of the management consultant unfolds.

**Liminality between roles**

Daskalaki and Simosi (2018) found that those between employment, such as management consultants between client engagements “on the bench”, adopt flexible identity positions and construct their liminality in both coherent and ambiguous ways. Being between jobs becomes a new reality that destabilizes personal and professional identities. They claim the unemployed re-construct their identities through a process during which they attempt to adapt to their new situation and reflect on possible post-liminal selves. They found that being between employments triggers trajectories from ambiguous possible identities to a liminoid one, where those struggling with indeterminate work futures or the enactment of new ones do not achieve a secure sense of self but enter a period of what Beech et al. (2016: 506) refer to as ‘unresolved identity work’. Garcia-Lorenzo et al. (2018) claim liminoid identities are resolved when workers are able to identify with a post liminal role. This could apply to management consultants stuck for long periods between roles, under pressure to become billable.

Chen and Reay (2020) reveal a different pattern of experience as people move between roles. In their study of imposed job redesign in a public services organisation they claim that
professionals initially resisted or avoided identity transition but eventually parked their professional identity, creating a liminal space that allows them to set aside their old selves try new ways of working and construct a new professional identity to meet the needs of the new work. This may be relevant to management consultants who find themselves on a client engagement in a role they perceive does not fit their professional identity, but they nevertheless feel under pressure to perform.

Literature relating to the liminal transition of promotion and associated work-related identity loss and mourning may also be relevant to management consultants. When it comes to promotion through the grades, Kornberger, Justesen and Mouritsen (2011) claim that those who are promoted experience liminal transition, separating both socially and spatially from their previous professional identity and entering transformative rites of passage, aggregating into their new professional identity (Beech, 2011). Those promoted may find it difficult to let go and experience grief and mourning for work-related identity loss (Conroy and O’Leary-Kelly, 2014; Chen and Reay, 2020). Management consultants experiencing difficulty in progressing through the grades may, like teaching professionals in a research orientated university, feel stuck in what they see as a marginalized occupational identity with no route to aggregation, in occupational limbo (Bamber, Allen-Collinson and McCormack, 2017). Others claim that when there is a lack of clarity over career paths boundaries become blurred, organisations are constantly changing and careers become permanently liminal (Budtz-Jørgensen, Johnsen and Sørensen, 2019)

2.5.5 Summary

In this section I reviewed literature on the liminality of those operating between systems. Views focus on three types of liminality for those operating between organisations: positional, spatial and temporal (Söderlund and Borg, 2017). Management consultants on a
client engagement, on client site, having adapted their professional identity may experience all three types of liminality simultaneously. There is also a view that liminality for management consultants is not linear and that management consultants do not re-aggregate with the client system. Some interpret this as permanent liminality and that those who operate between organisations preserve their professional identity by developing a permanent liminal identity (Ellis and Ybema, 2010), or become boundary bricoleurs, constantly switching between identities (Ybema, Beech and Ellis, 2011).

I reviewed literature on liminality between work and personal systems where some interpret management consultants showing full time availability at all times and all places as being in a state of permanent liminality suspended between work and personal systems (Johnsen and Sørensen, 2015). Others claim that those who regularly experience extended periods of liminality may experience mental health issues (Dorow and Jean, 2021). However, those studying flexible working for management consultants found they were able to manage the tensions between work and personal systems and construct a work life balance (Canibano, 2019). The liminality of travel is also relevant with contrasting views on whether travel time may be spent beneficially as a role clarifying buffer between systems or offering possibilities not available at other times (Wilhoit, 2017). Whilst others claim that those such as management consultants who regularly travel between locations are in a permanently liminal state where other systems are allowed in or excluded at different times (Daskalaki, Butler and Petrovic, 2016).

I reviewed literature that provided insight into liminal experiences between internal consultancy teams (Swan, Scarbrough and Ziebro, 2016). I also reviewed literature on liminality between roles which is relevant to management consultants being on the “bench” between client engagements (Daskalaki and Simosi, 2018), and those promoted to a more senior grade (Kornberger, Justesen and Mouritsen, 2011).
2.6 Re-visiting the research questions

I conclude this chapter by revisiting the research questions in the light of my review of existing literature on management consultancy and liminality considered relevant to understanding how management consultants navigate the competing systems of the client, their consultancy, and their personal life.

The client-facing role of the management consultant is comparatively well researched and understood in the literature. Although management consultants’ experiences of the initial engagement with the client appear to have been less studied. The study into learning-credibility tension by Bourgoin and Harvey (2018) gives some indication of management consultants’ experiences when navigating a new client engagement. However, it was necessary to rely on research into the experiences of learning by students for insight into the experiences of management consultants gaining an understanding of the client, the client organization, and a potentially complex solution. Similarly, it is unclear how management consultants cope with the liminality of their client engagement and the consequential disruption to their professional identity. Some have proposed that those who are regularly liminal between organisations develop a permanent liminal identity (Ellis and Ybema, 2010). Others that identity reformulation for liminals is on a continual basis, in relation to their social situation (Reed and Thomas, 2019). Or that the disruption caused to professional identity by liminality is unresolved identity work that will only be resolved by re-aggregation with a stable state (Beech, 2011; Beech et al., 2016).

In contrast to the client-facing role, the consultancy facing role and the requirement for management consultants to contribute to the operation and ongoing success of their consultancy, is relatively under-researched. My review of management consultancy literature demonstrated that research on the consultancy-facing role is fragmented,
embedded in research on management consultancy topics such as knowledge management and HRM processes. The consultancy-facing aspects of the management consultant’s role have not so far been drawn together in a single study and as a result the extent of consultancy-facing responsibilities, and how, when or where these responsibilities are performed, is not fully understood in the literature. This review has confirmed that the consultancy-facing role has not been researched sufficiently and little has appeared in the literature about how management consultants balance their participation between three different social systems. Their skills in managing transitions between them are worthy of study.

My literature search found just seven relevant studies on liminality in a management consultancy setting. This included some recent interest in the liminality of management consultants navigating between work and personal systems (Johnsen and Sørensen, 2015; Canibano, 2019). This supports the concept of liminality as an appropriate theoretical framework to provide new perspectives in my exploration of management consultants’ experiences of navigating between competing systems. My review of liminality literature relating to management consultancy and other relevant domains indicates that liminality for management consultants may not be consistent with the traditional anthropological conception of liminality as a sequential three stage process (Turner, 1967, 1969; Van Gennep et al., 2019). There is a tension between liminality as temporal and transitional state and as a continuing or permanent state of being ‘betwixt and between’. As already noted, this is an unresolved issue in the literature, and I will investigate empirically which kind or kinds of liminality are relevant to management consultants.

In the research I therefore use conceptions of liminality to illuminate how management consultants experience and navigate between the competing demands of their consultancy-facing, client-facing and personal systems of engagement. The research explores:
• How the consultancy-facing role of the management consultant unfolds in terms of the tasks involved and when, where, and how these tasks are undertaken

• What management consultants consider are effective ways of navigating the demands of their competing systems

• How the context of the consultancy team shapes the experiences of consultants

• How the management consultant’s experience is shaped by their own role and its context in terms of grade seniority

As well as contributing to literature by empirically investigating aspects of management consultancy not previously explored, the research will provide useful insights for management consultancy practice in terms of the wellbeing of management consultants and creating sustainable careers in management consulting.
3 Methodology

3.1 Chapter Introduction

In this chapter I present my overall approach to the research. I begin by providing an overview of my selected research paradigm. I then discuss the philosophical underpinnings in terms of ontological, epistemological and axiological assumptions to meet the aims of the research. I continue by discussing my rationale for selecting a qualitative methodological framework based on Interpretative Phenomenological Analysis. I then discuss my sampling strategy. First my rationale for selecting multiple research settings, the sample universe for the selection of settings, and a brief description of each research setting selected. I continue with my approach to sourcing the sample in terms of access, my approach to sampling within the research settings, and how differences in consulting grades and roles between settings was managed. I then present details of the research participants selected. I continue by discussing sources and methods for data collection and the standards adopted for data management. I then describe how the data were analysed and present the emerging themes and incidence of the themes by consultancy setting. I reflect on my own role as a researcher and discuss the reflexive strategies I adopted to mitigate the potential impact of having previously practiced as a management consultant with a global firm. I also describe the steps taken to ensure the study achieved high ethical standards and discuss the reliability, validity, and generalisability of the research. I conclude by introducing my findings chapters relating to the three superordinate themes emerging from the research.

3.2 Philosophical underpinnings

The philosophical assumptions underpinning the research about the world and the nature of social reality (ontology) the nature and purpose of knowledge (epistemology) and the role of values and ethics in the research process (Axiology) have implications for the research
design as a whole (Cunliffe, 2011). In this section I first present an overview of my selected research paradigm. I then present alternative philosophical underpinnings and justify my selection of an inductive-abductive inquiry based on interpretivism.

3.2.1 Research paradigm

The study was exploratory and interpretative. I adopted a subjectivist ontology; a social constructionist epistemology and a qualitative methodological framework based on Interpretative Phenomenological Analysis using in-depth semi-structured interviews to investigate how management consultants experience and navigate between competing systems of engagement. I present these choices as an engaged interpretivist research paradigm in Figure 3.1, below:

![Figure 3-1: Research Paradigm](image)

Adapted from (Easterby-Smith, Thorpe and Jackson, 2015)

3.2.2 Philosophical assumptions

There are many different philosophies underlying business and management research. As shown in Figure 3.1, ontological alternatives are often presented as a continuum between a subjectivist ontology at one extreme and an objectivist ontology at the other (Morgan and
An objectivist ontology assumes social phenomena present themselves as external facts beyond our influence, a defined reality that may be accurately observed and measured (Bryman and Bell, 2015; Easterby-Smith, Thorpe and Jackson, 2015). A subjectivist ontology assumes reality is socially constructed and that social phenomena and their meanings are not only produced by social interaction but are in a constant state of revision (Bryman and Bell, 2015; Easterby-Smith, Thorpe and Jackson, 2015). Subjective phenomena are conceptual, and explanation is always provisional and does not exist in a straightforward objective way. A subjectivist ontology is compatible with the research aim of understanding. In contrast, an objectivist ontology is not compatible with the research aim of seeking to understand and interpret lived experiences of management consultants as there is no independent reality, only the subjective perceptions of the researcher and research participant.

Ontological and epistemological assumptions are interrelated and the different world views reflected by ontological assumptions imply different grounds for knowledge about the social world (Morgan and Smircich, 1980). Whilst ontology is concerned with whether or not the phenomenon of interest exists independently of our knowing and perceiving it, epistemology is concerned with what constitutes significant true and justifiable knowledge (Scherer, Does and Marti, 2015). An objectivist ontology that assumes the social world exists externally and that its properties can be measured is usually associated with a positivist epistemology that assumes knowledge is of significance only if it is based on observations of this external reality, values may be determined by objective criteria rather than human beliefs and the aim of the research is to find causal explanations through the use of hypothesis, deduction and measuring facts (Easterby-Smith, Thorpe and Jackson, 2015). In contrast a subjectivist ontology that assumes reality is socially constructed may be associated with interpretive epistemologies such as social constructionism that assume significant knowledge may be
accessed by appreciating the different constructions and meanings people place on their experiences rather than searching for external causes and fundamental laws to explain behaviour (Easterby-Smith, Thorpe and Jackson, 2015).

The research is interpretative in nature where the researcher seeks to interpret the day to day lived experiences of management consultants navigating between competing systems of engagement. Al-Amoudi and O’Mahoney (2016) claim interpretivism has its roots in the hermeneutic tradition and the idea that the social and human world is meaningful. They claim that while the necessity of interpretation is primarily an epistemological implication, it also has significant ontological implications as it implies the world is also made of meanings, values, emotions and representations. They claim that Interpretivism is concerned with understanding how individuals make sense of the world. However, the phenomenon does not exist independently of the person that observes it but is socially constructed through processes of interpretation (Scherer, Does and Marti, 2015). An interpretivist research paradigm based on a subjectivist ontology that assumes social phenomena and their meanings are socially constructed and a social constructionist epistemology is entirely compatible with the aims of the research.

The final strand of philosophy underpinning any research is axiology. This concerns the role of values and ethics in the research process and determines how personally involved the researcher becomes in the research process (Creswell and Poth, 2018). According to Scherer, Does and Marti (2015) positivists endorse a value free approach and believe researchers should stick to descriptive truth claims about what the world is and refrain from making value judgements. They argue that claims on how the world should be are based on subjective values and cannot be generalized nor justified. In contrast, the interpretivist’s view is that knowledge is always value laden and interest prone. They argue that knowledge formation needs to aim at improving the social world for its inhabitants, and researchers
must not refrain from ethical considerations and value judgements in their inquiry (Scherer, Does and Marti, 2015). I adopted an interpretivist stance and my own values inevitably played a part in interpreting the lived experiences of management consultants. However, this was mitigated by reflexivity, which is covered later in this chapter.

### 3.2.3 Logic of enquiry

Philosophical assumptions have implications for the logic of enquiry. A positivist epistemology implies deductive inquiry which Easterby-Smith, Thorpe and Jackson (2015) describe as concerned with discovery through quantitative methods such as experimentation or large-scale surveys to verify or falsify hypotheses and confirm or disprove theories. In contrast, a social constructionist epistemology indicates an inductive enquiry described by Easterby-Smith et al. (2015) as being concerned with sense-making and understanding through qualitative engagement and reflexivity resulting in theory generation and new insights.

When considering the logic of inquiry best suited to meet the aims of the research the question was therefore whether the aim is to test existing theory or build new theory (Blaikie, 2010). Testing theory indicates a deductive logic where theory is tested against pre-defined hypotheses to provide explanations (Bryman and Bell, 2015). However, the research aim is to extend existing theory or develop new theory relating to the experiences of management consultants navigating competing systems of engagement and an inductive, data-driven logic where theory is induced and developed from rich data is appropriate (Bryman and Bell, 2015). An inductive approach is also supported by Edmondson and Mcmanus (2007) who argue that nascent theory is best explored inductively. They draw on the similarities in past nascent theory studies to show that such studies lend themselves to gathering open ended data that need to be interpreted for meaning.
A further option was an abductive approach which aims to develop hypotheses (Stainton-Rogers, 2006). In abductive research, multiple interpretations are explored in parallel and the best explanation is selected (Mantere and Ketokivi, 2013). Abductive logic involves conjecture and theorizing (Bryman and Bell, 2015). Blaikie, (2010) sees abductive logic as highly compatible with developing and elaborating theory iteratively. The research aim was to use conceptions of liminality to illuminate how management consultants navigate between competing systems. The inquiry therefore required abductive rather than purely inductive logic as I brought together categories induced from the data analysis and interpreted them iteratively using theoretical concepts of liminality. Inductive-abductive inquiry is compatible with an interpretivist research paradigm and is appropriate to meet the aims of the research.

3.3 Methodological framework

In this section I first discuss research orientation and my choice of qualitative engagement. I then discuss my rationale for selecting Interpretative Phenomenological Analysis to explore and interpret the experiences of management consultants and answer the research questions rather than alternatives such as discourse analysis, grounded theory or ethnography.

3.3.1 Research orientation

An analysis of the management consultancy literature that formed the basis of the literature review in Chapter 2 showed that the research methodology adopted for management consultancy studies is overwhelmingly qualitative. A methodological approach based on qualitative engagement appears the most suitable to meet the overall aim of the research. However, Sturdy (2012), observes the heavy use of post hoc interviews in management consultancy research. He highlights the need to get beyond formal accounts from senior staff and public documents, towards an understanding of the practices of management consultancy. The research seeks to achieve this by aiming to gain insight and understanding
into the lived experiences of practicing management consultants engaged in delivering consulting projects for clients, hence the choice of Interpretative Phenomenological Analysis (IPA)

3.3.2 Why Interpretative Phenomenological Analysis?

I discuss my reasons for selecting IPA, a qualitative approach concerned with in-depth exploration of lived experience, and with how people make sense of that lived experience (Smith and Shinebourne, 2012). IPA is idiographic in nature, focusing on the experiences of individuals, and therefore an appropriate method to meet the aims of the research and the focus on gaining an understanding of lived experiences and what it is like to be a management consultant (Smith, Flowers and Larkin, 2009). IPA is a relative newcomer, first described by Smith (1996). Since then the dominant use of IPA has been in psychology, health and social sciences with recent interest in business and management (Gill, 2015). IPA has three primary theoretical pillars: Phenomenology; Hermeneutics and Idiography (Smith and Shinebourne, 2012). IPA is compatible with an interpretivist research paradigm and qualitative engagement.

The first pillar of IPA is the broad and diverse tradition of phenomenological approaches to inquiry and has its roots in the transcendental phenomenology of Husserl (1859–1938). Husserl’s phenomenology involved examination of human lived experience in its own terms which required the researcher to “bracket” their own pre-conceptions, setting aside the taken-for-granted world to allow the phenomenon to speak for itself. This is in contrast to a social-constructionist onto-epistemology which assumes the inseparability of the researcher from the research (Cunliffe, 2011). Husserl’s philosophy was highly influential in phenomenological approaches including IPA but was nevertheless regarded as highly conceptual and somewhat inaccessible (Smith, Flowers and Larkin, 2009).
The second pillar of IPA is hermeneutics introduced by Heidegger (1889-1976), a former pupil of Husserl. Heidegger rejected what he regarded as Husserl’s transcendental idealism in favour of a model that linked phenomenology with hermeneutics, the theory of interpretation, and Dasein, the experience of being that is peculiar to human beings. Heidegger believed that, as things don’t always show themselves as they are, phenomenology cannot be simply description. In contrast to the beliefs of Husserl, he believed phenomenology was about seeking a meaning which is perhaps hidden by the entity’s mode of appearing. Heidegger believed the proper model for seeking meaning was the interpretation of a text or discourse and hence linking phenomenology with hermeneutics (Moran, 2000). IPA involves a double hermeneutic where the participant is trying to make sense of what is happening to them whilst the researcher is trying to make sense of the participant trying to make sense of what is happening to them. IPA has a conception of the person as inherently self-reflective. Sense-making happens automatically, it is part of being human and does not need the researcher to engender it (Smith, 2018). However, the experience belongs to the participants and the researcher must therefore engage in a process of interpretation more systematically and fully than the participant. (Smith and Osborn, 2003).

The third pillar is the idiographic nature of IPA which is concerned with the particular experience of the individual. IPA may concern a single individual (e.g., Eatough and Smith, 2006). More commonly however, an IPA study involves a small number of cases each analysed in turn. The researcher then moves to look for patterns across individual accounts but tries to retain the detail and nuance of individual accounts. IPA therefore presents an analysis of convergence and divergence. IPA seeks to understand and describe the essence of an experience by studying several individuals who share similar lived experience, such as management consultants experiencing and navigating between their competing systems of
engagement. IPA assumes a reasonably rich and reflective level of personal account. The preferred method of data collection is in-depth interviews where questions focus on individuals’ understandings of their own experiences (Smith, Flowers and Larkin, 2009). The individual voices of participants are privileged even when findings are presented in more general terms (Dunworth, 2008). In common with grounded theory and qualitative approaches in general, analysis is inductive and iterative. IPA relies on richness and depth of description of phenomena rather than explanation. Whereas theory development is not initially the primary aim, the richness and depth of description combined with inductive logic is likely to lead to the development of explanatory or theoretical constructs (Dunworth, 2008).

There is some scholarly concern about the authenticity of IPA as a phenomenological approach. Van Manen (2017) is highly critical of studies claiming to be phenomenology simply because the focus is on experience, arguing that many qualitative methodologies are concerned with experience. He also warns against constructivist approaches where meaning is constructed or attributed to a phenomenon by the subject, emphasizing that phenomenology is the study of eidos (unique meaning) of what shows or gives itself in lived experience; or the study of how phenomena and events give themselves to us. Van Manen (2017: 776) claims there are many good phenomenological studies and provides examples of the generic form of phenomenological questions: “What is <this lived experience> like?” “What is it like to experience <this phenomenon or event>?” “How do we understand or become aware of the primal meaning(s) of <this experience>?” He argues that approaches such as IPA that focus on how individuals make sense of their own experiences confuse phenomenology with psychology. In contrast Smith (2018) argues that phenomenology and psychology should not be perceived as two mutually exclusive constructs vying for the same territory. More as different constructs operating at different, but mutually compatible levels.
Van Manen (2017) also claims that step by step approaches that produce a list of themes do not guarantee phenomenological insights and warns that themes should be treated only as an intermediate tool for phenomenological inquiry and reflective writing.

According to Gill (2014) Van Manen’s phenomenology is not completely Husserlian nor Heideggerian. However, in his critique of IPA Van Manen does appear to adopt the tenets of the descriptive phenomenology of Husserl. This involves epoche where the researcher disconnects from or transcends (brackets) their own beliefs, and reduction and the focus is on ‘transcendently purified phenomena’ meaning free from everyday assumptions. A further tenet of descriptive phenomenology is eidetic reduction in search of the eidos (unique experience) or the essence of the phenomenon (Gill, 2014). In contrast, IPA as defined by Smith, Flowers and Larkin (2009) is more aligned with the interpretative phenomenology of Heidegger which explores the human experience of being or “Dasein” and emphasizes that interpretation is not a choice but an integral aspect of research, and that everyone exists in a culturally and historically conditioned environment from which they cannot step outside (Gill, 2014). This exchange between Van Manen, Smith and Gill supports rather than detracts from my perception of IPA as a relevant methodological framework for seeking to interpret management consultants’ own interpretations of their day to day lived experiences of being a management consultant.

3.3.3 Comparison with alternative methodological frameworks

Here I explore the relevance of three alternative qualitative methodological frameworks: discourse analysis; grounded theory and ethnography. I compare each with IPA and justify my selection.
**Discourse analysis**

Whilst IPA focuses closely on language it differs from other approaches that focus on language such as discourse analysis which can be applied to naturally occurring and contrived forms of talk and texts. Discourse analysis is a social constructionist approach which, according to Bryman and Bell (2015), is not just a mirror of the social world but plays a key role in producing that world in terms of how we say things, our emphases and the things we leave out, all of which have an impact on others’ perceptions and understandings and on their and our reality. Discourse analysis operates on texts in the form of documents and transcripts and interpretations of utterances in naturally occurring talk such as conversations or written communications exchanged between organizational members (Cunliffe, 2008). Discourse analysis may be used to understand how individuals process their experience, or in fact experience the world, (Easterby-Smith, Thorpe and Jackson, 2015).

There are many similarities between discourse analysis and IPA. However, according to Wertz et al. (2011), discourse analysis focuses on patterns of verbal performance, whereas phenomenological approaches such as IPA attempt to more comprehensively understand and interpret the intentionality of subjective experience. Discourse analysis attends to the socially interactive aspects of written and spoken language as the locus of and primary context for analysing meaning. In contrast, phenomenological approaches tend not to analyse the text or the interactions except in as much as they provide access to prior lived experiences. Whereas discourse analysis illuminates the interview itself as context that shapes the production of writing and talk, phenomenological approaches see the interview as expressing examples of the research topic (Wertz et al., 2011). As a phenomenological approach, IPA is more suited to understanding the lived experiences of management.
consultants although it is possible to see how discourse analysis and IPA could work together as a mixed method approach in the future.

**Grounded theory**

Grounded theory, originally discovered by Glaser and Strauss (1967), has its roots in positivism where empirical observations were equated with an external reality. However, Strauss and Corbin (1994) and in particular Charmaz (2016) propose a more constructivist, reflexive approach to grounded theory. Constructivist grounded theory involves an iterative, comparative process of simultaneous data collection and analysis, successively focusing data collection to develop emerging categories, making abductive conjectures and constructing hypotheses about categories, and checking them against data. (Charmaz, 2016). Data collection and analysis continues until data saturation is reached and no new codes are identified (Goulding, 2005). Grounded theory focuses on grounding theory in the views of individuals rather than their perceptions of their experience. In contrast IPA emphasizes the subjective experiences of participants. The researcher captures rich, sometimes mundane, detail of participants lived experiences and often present data in relatively raw form to demonstrate their authenticity and to permit a holistic interpretation of the participant's understanding of their experience. Analysis is detailed and idiographic in nature data with some focus on language used in terms of the experience to which it relates (Smith, Flowers and Larkin, 2009).

Although there are some similarities between grounded theory and IPA, researchers using grounded theory are less focused on subjective experiences of individual participants and are instead more attentive to how such subjective experiences can be abstracted into theoretical statements about causal relations between participants (Suddaby, 2006). Nevertheless, there is a considerable overlap between IPA and what constructivist grounded theory can do (Charmaz, 2011). They both adopt a broadly inductive logic of inquiry.
However, IPA is likely to offer a more nuanced analysis of the lived experience of a small number of participants with an emphasis on the convergence and divergence between participants. In contrast a grounded theory study of broadly the same topic is likely to aim for a more conceptual explanatory level based on a larger sample size where researchers draw on individual accounts to illustrate theoretical claims. A small IPA study could lead to a subsequent larger scale grounded theory study (Smith, Flowers and Larkin, 2009).

**Ethnography**

Qualitative research designs include ethnography where the researcher immerses themselves in the research setting and becomes part of the group under study so as to understand the meanings and significances that people give to their behaviour and that of others (Easterby-Smith, Thorpe and Jackson, 2015). The aim of ethnography is to explain the ways that culture constructs and is constructed by the behaviours and experiences of its members. Ethnography involves prolonged participation within a specific culture or sub-culture. The potential for ethnography lies in applying multiple data collection methods to a single phenomenon. These may range from surveys to observational data, video tapes, photographs and recordings of speech in action (Goulding, 2005). The reflexive nature of ethnography is a characteristic which implies that the researcher is part of the world that is under study and is consequently affected by it. An important advantage of ethnography is that insider and outsider views are combined to provide deeper insights than would be possible by the “native” alone (Goulding, 2005). This two-sided view produces a third dimension that rounds off the ethnographic picture, which is a theoretical explanation of the phenomena under study.

Watson (2011) makes a strong case for ethnography. He argues that it is not possible to understand what actually happens or how things work in organizations without doing the intensive type of close-observational or participative research that is central to ethnography.
He claims that interviews carried out in the absence of close observation and workplace interaction with research subjects may be little better than surveys in gaining understanding, as they lack context. However, an analysis of existing management consultancy research demonstrates that ethnographies are relatively rare, most likely because management consultants spend much of their time on client site and there are client sensitivities (Sturdy, 2012).

I considered the use of ethnographic methodology for the research, because of its relevance to my research objectives. However, I experienced this resistance of consultancies first-hand. I negotiated for six months with a consultancy with which I have a connection. The negotiation was very positive, and I worked with the Head of a consultancy practice and a Human Resources representative to formulate the aims and objectives of the research. The study was to be restricted to embedding myself at base office with no direct access to client sites although there would be access to management consultants on client engagements who were visiting base office, and access to internal office-based teams. Negotiations were at an advanced stage however, at the final decision-making hurdle access was denied on the grounds that my association with the consultancy was too easy to trace, and the anonymity of the consultancy would be severely compromised. I turned to my network of previous consulting colleagues who had moved to other consultancies and were now in senior decision-making positions but there was no appetite for ethnography, not even an ethnography that was restricted to base office. Management consultancies are fiercely protective of their commercial interests, client confidentiality and knowledge (Gluckler and Armbruster, 2003). I feel my experience as a senior manager in consulting and knowledge of how things work, combined with my historical connection to a specific consultancy, may have worked against me.
I selected IPA initially partly because ethnography proved not to be a viable or realistic prospect, given the commercially sensitive nature of working in this sector. However, I found that there is a strong case for its validity for my research objectives. Indeed, I feel that my research has benefitted significantly from selecting IPA as the methodological framework. IPA offers an approach to interviewing that allows a richness of data generation that compensates for some of the weaknesses of interviews described by Watson (2011) and Sturdy (2012). Furthermore, the focus of ethnography is on the behaviours of a culture sharing group (Creswell and Poth, 2018) whereas the focus of the research is on the lived experiences of management consultants and what it is like to be a management consultant. IPA is therefore a good fit (Smith, Flowers and Larkin, 2009).

3.4 Sampling strategy

Sampling is a fundamental element of qualitative research that has implications for its coherence, transparency, impact and trustworthiness (Robinson, 2014). In this section I begin by discussing my rationale for selecting multiple research settings. I then outline my approach to sampling. I first define management consultancy in terms that provide a sample universe for the selection of research settings followed by a brief description of each research setting selected. I outline my approach to sourcing the sample in terms of access. I then outline and justify my approach to sampling within the research settings and how differences in consulting grades and roles between settings was managed. Finally, I present details of the research participants selected.

3.4.1 Why multiple research settings?

The in-depth nature of IPA lends itself to small sample sizes, typically a homogeneous group of fewer than ten. Groups of fewer than six and even single participants in IPA research are not uncommon (Smith, Flowers and Larkin, 2009). However, I decided to break with the
IPA assumption of a homogeneous sample by selecting three consultancy settings. This was a means of introducing some heterogeneity into the sample to ensure I was able to develop a multifaceted account of the phenomena under investigation. Individual participants were the unit of analysis and the multiple settings design involved using more or less identical methods across settings. I wanted to introduce some areas of possible difference but there was no intention to select strongly contrasting settings to enable comparison. However, there were some differences in settings relating to size, specialism, and reach. So, whilst the three research settings were not specifically selected to enable comparative analysis, where these were possible, they were exploited to maximise the theoretical generalisability of the research. These differences are explained fully in my description of the selected research settings later in this section. The multiple settings provided the means to identify where findings derived from each of the consultancy settings differed and to understand the reasons for those differences. My approach therefore embodies some element of logic of comparison which implies we can understand social phenomena better when they are compared in relation to two or more meaningful contrasting situations (Bryman and Bell, 2015). This is in addition to the normal approach for IPA research.

Stake (2006: 6) refers to multiple case studies as a “Quintain”, a collective target where the individual cases are categorically bound together and organised around the research question. He claims that studying what is similar and different between cases enables the researcher to better understand the quintain. It is therefore possible to conclude that a multiple case study design facilitated a more in depth understanding of how management consultants navigate competing systems of engagement. Tsang (2014) argues that a multiple case study may highlight differences that increase the generalisability of the research findings.
3.4.2 Defining the sample universe

Applying criteria to define a sample universe i.e., the total population of management consultancies from which to select research participants, is important as it helps to understand the generalisability of research findings and helps to establish that a theory developed within one particular context applies to other contexts (Robinson, 2014). The focus of the study was management consultancy. However, there is no single definition for management consultancy. The pilot study in 2017 focused on the Customer Experience and Analytics capability team of approximately 200 management consultants within the UK operation of a global consultancy employing a total of 6000 management consultants of which approximately 1000 were in the UK. Using my experience of the pilot and data available from the various consultancy websites, I determined that the most appropriate criteria to be applied for the selection of consultancy settings should include, market segment; reputation of the consultancy; size and geographical location. I outline below the implications of considering each of these.

Market segment

When considering market segments, Consultancy.uk (2018) identifies six key market segments for Consulting. These are strategy; management; operations; human resources; financial advisory and technology. The phenomena of management consultants navigating between competing systems of engagement is likely to apply across market segments and it is appropriate to adopt a broad definition. The Consultancy.uk definition also aligns with the Financial Times definition for its analysis of leading management consultancies based on peer and client recommendation and therefore offers consistency.
Size and geographical location

The pilot study indicated that the lived experience of management consultants navigating between competing systems may vary with grade seniority and the selected consultancies must therefore be of sufficient size to accommodate a range of consulting grades. The management consulting industry is dominated by a large number of small enterprises. According to Consultancy.uk (2021) 85% of the consulting industry, based on number of firms, is made up of freelance management consultants operating as independent advisors or contractors. The remaining 15% are large, medium and small consultancies. In their report in 2018 Consultancy.uk estimated that one fifth of consulting work goes to independent consultants. Assuming consistent average fee levels across all firms the 15% of the industry made up of small medium and large consultancies therefore accounts for 80% of UK consulting revenue and this provides further support for a research focus on the largest 15% of firms. The MCA (2021) defines larger consultancy firms as those employing more than 100 consultants which is the minimum size likely to provide the range of grades by seniority to meet the requirements of the research. Geographical location is a further consideration. For practical reasons the research was conducted in the UK and the selected management consultancies must therefore have a UK operation employing at least 100 management consultants.

Reputation

The selected consultancy settings must be reputable and provide a positive working environment so as to avoid the research being undermined by underlying issues with employment conditions and questionable practices. Membership of the MCA indicates a commitment to consulting excellence in terms of ethical behaviour, client service and value and staff development. The Financial Times Report ranking the UK’s top 100 Management
Consultancies based on peer and client recommendations is also an indication of good reputation (Consultancy.uk, 2021).

In summary, the criteria relating to management consultancies used to form a sample universe for the purposes of the research are as follows:

- Operate in one or more of the six market segments identified by Consultancy.uk.
- An operation in the UK employing at least 100 consultants.
- Members of the MCA and/or on the Financial Times list of top 100 consultancies based on peer and client recommendations.

### 3.4.3 Sourcing the sample

Sourcing the sample depended on negotiating access. I leveraged my network to gain an introduction to the Chief Executive Officer (CEO) of the Management Consultancies Association (MCA), the representative body for management consultancy firms in the UK. I met with him at the MCA offices in London and we discussed the aims and objectives of the research, and the criteria for selection of consultancies. He agreed to support my research and sent an invitation to participate to member consultancies that met the criteria. Three consultancies responded positively. All met the criteria and offered sufficient variety in market focus, specialism and size to provide the potential for different perspectives.

I describe the three selected consultancy settings, drawing out the similarities and differences between them. In the interests of confidentiality and the anonymity demanded by ethical research and preferred by the participating consultancies, I refer to the consultancies using the pseudonyms: Achieve, Perform and Protect. The consultancies all met the criteria in that they all operate in one or more of the consultancy segments defined by Consultancy.uk, they employ more than 100 consultants in the UK and were all named in the ft.com (2021) top...
100 UK consultancies based on client and peer recommendation as well as being active members of the MCA. The consultancies are similar in that they are all concerned with management consultancy however, they differ in size, geographical reach and specialism. I provide an overview in Table 3-1 below:

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Achieve</th>
<th>Perform</th>
<th>Protect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governance</td>
<td>Private Limited Company</td>
<td>Private Limited Company</td>
<td>Private Limited Company</td>
</tr>
<tr>
<td>£ Consulting 2019</td>
<td>£25.6m</td>
<td>£26m</td>
<td>£348m</td>
</tr>
<tr>
<td># Employees UK</td>
<td>150</td>
<td>150</td>
<td>2800</td>
</tr>
<tr>
<td>Specialism</td>
<td>Operational Improvement and Transformation</td>
<td>Change and Programme Management</td>
<td>Applied Intelligence</td>
</tr>
<tr>
<td>Geographical reach</td>
<td>Global</td>
<td>UK only</td>
<td>Global</td>
</tr>
</tbody>
</table>

Table 3-1: Research Settings

**Achieve**

Achieve was established approximately twenty years ago as a family firm and has grown into a medium sized consultancy of 150 management consultants working mainly in the UK but also globally. In addition to the permanent staff Achieve operates an Associate scheme utilising known, experienced contractors to supplement permanent employees on client engagements when specific skills or experience is needed. Achieve specialises in operational improvement and transformation.

**Perform**

Perform was established in 2004 and had steadily grown into a medium sized consultancy of approximately 150 consultants. As with Achieve, Perform also uses Associates from the independent consultancy market when specific skills are needed to fulfil the requirements of
a client engagement. Perform specialises in Change and Programme Management and operates only in the UK,

**Protect**

Protect is an international business and technology consulting subsidiary of a global organization. Protect was established approximately fifty years ago and specializes in applied intelligence mainly in the fields of cybersecurity and customer insight. Protect employs around 4800 consultants globally, 2,800 of whom are in the UK.

### 3.4.4 Sampling within research settings

There is a view that in interview-based research the sample must be large enough to achieve theoretical saturation, a term most closely associated with grounded theory. Theoretical saturation is defined as the point in data collection and analysis when additional data does not develop the properties of a category or codebook (Glaser and Strauss, 1967; Guest, Bunce and Johnson, 2006). The size required to reach theoretical saturation depends on the homogeneity of the sample. If the sample is relatively homogeneous the sample size required to achieve theoretical saturation is likely to be smaller (Guest, Bunce and Johnson, 2006). There is very little guidance in the literature on the number of interviews likely to be required to achieve theoretical saturation. Guest et al. (2006) conducted an experiment where they conducted sixty interviews across two sites, thirty from each site, and found that 80% of the codes were generated from the first six interviews.

IPA, whilst similar to grounded theory in that the researcher identifies themes that emerge through the iterative comparison of data, does not seek theoretical saturation (Gill, 2015). IPA focuses instead on detailed interpretative and idiographic accounts, achieved through a relatively small sample size. The emphasis is on having sufficiently rich data as opposed to
the number of participants. IPA relies on the sample being homogeneous in terms of individuals who share the same kind of lived experience in this case of navigating between competing systems of engagement. It was therefore important that participating management consultants were directly involved in delivering projects for clients and able to experience navigating between competing systems. It was also important that selected management consultants were demographically representative of their consultancy and the number of consultants from each grade in the sample was representative of the consultancy as a whole.

The advantage of a more heterogeneous sample is that any commonality found across a diverse group is more likely to be generalisable than a commonality found in a homogenous group. Therefore, heterogeneity of sample helps provide evidence that findings are not only applicable to a particular group, time, or place. However greater heterogeneity requires a larger sample size and this is not compatible with the primary concern of IPA which is a detailed account of individual experience (Smith, Flowers and Larkin, 2009). Some heterogeneity was achieved through the selection of eight to ten participants from each of three research settings which provided a larger overall sample size than might otherwise have been possible with an IPA study of a single setting. The research settings also differed in size, specialism, and geographical reach.

A purposive strategy was adopted, based on a priori understanding of the topic being studied and the research questions (Robinson, 2014). A purposive sampling strategy is recommended for IPA as the aim is to provide a full interpretation in relation to a research question (Smith, Flowers and Larkin, 2009). The pilot study indicated that the experience of navigating between systems of engagement may vary across consulting grades. This indicated the need for a stratified sample, defined by Robinson (2014) as discrete and non-overlapping categories, across the range of consulting grades. A demographically representative sample of between eight and ten consultants was selected from each
consultancy setting. The number selected within each grade was in proportion to the numbers within each grade at each of the selected consultancies. This provided further heterogeneity of sample. In all settings participants as far as possible, belonged or had recently worked with, the same practice or project team so as to assess the impact of team dynamics.

In summary the criteria for the purposive selection of research participants from within consultancy settings were as follows:

- Sample size of between 8 and 10 participants from each consultancy setting
- Engaged in delivering projects for clients and therefore able to experience navigating between competing systems of engagement
- Range of grades as the pilot indicated that the experience of navigating competing systems varied according to grade seniority
- Demographically representative of the consultancy as a whole
- Belong to the same team so as to understand any impact of team dynamics

### 3.4.5 Consultancy roles and grade structures

The data from operational documents and interviews with gatekeepers and participants, outlined later in this chapter, indicated that the roles and grading structures of Achieve, Perform and Protect did not fully align. In order to facilitate comparison of findings between grades and consultancy settings I merged the different grading structures to form five broad consultancy roles. The role of Senior Manager exists only in Protect because of its larger size. Achieve do not have any consultants below Senior consultant grade. This reflects their policy of recruiting knowledgeable practitioners from industry and MBAs and rewarding them appropriately through the grading structure. The roles are shown in Table 3-2 below alongside examples of their responsibilities across four key aspects of the role:
<table>
<thead>
<tr>
<th></th>
<th>Director</th>
<th>Senior Manager (Protect only)</th>
<th>Manager</th>
<th>Senior Consultant</th>
<th>Consultant (Except Achieve)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal contribution</strong></td>
<td>Member of the senior leadership team of their consultancy.</td>
<td>Significant team leadership role within sector e.g. people and skills lead</td>
<td>Team leadership role within sector or capability e.g. process lead</td>
<td>Contributes to sector or capability team e.g. events, stream leadership</td>
<td>Contributes to sector or capability team e.g. communication</td>
</tr>
<tr>
<td></td>
<td>Head of sector e.g. Insurance or capability team e.g. central government consulting</td>
<td>Leading an internal project to develop a new service offer</td>
<td>Leading a stream of an internal project to develop a new service offer</td>
<td>Contributing to knowledge and service offer development</td>
<td>Contributing to knowledge and service offer development</td>
</tr>
<tr>
<td><strong>People Management</strong></td>
<td>Performance management and career development of Senior/Managers</td>
<td>Performance management and career development of Managers and Senior Consultants</td>
<td>Performance management and career development of Senior Consultants and consultants</td>
<td>Act as a buddy to a consultant</td>
<td>Act as a buddy to a new recruit</td>
</tr>
<tr>
<td></td>
<td>Involved in recruitment</td>
<td>Involved in recruitment</td>
<td>Involved in recruitment</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Client engagement</strong></td>
<td>Oversight and escalation point for client engagements within sector or capability</td>
<td>Engagement lead for one or more client engagements</td>
<td>Engagement lead for one or more client engagements</td>
<td>Leading a small client engagement or stream within a larger client engagement</td>
<td>Working alongside client resources in a mixed client-consultancy team</td>
</tr>
<tr>
<td></td>
<td>Build relationships with senior “C Suite” directors of firms within their sector</td>
<td>Negotiating client engagement extensions</td>
<td>Shaping client engagements and extensions</td>
<td>Identifying opportunities for engagement extensions</td>
<td>Identifying opportunities to extend own role</td>
</tr>
<tr>
<td><strong>Utilisation target</strong></td>
<td>Expected to bill 25% of their time to clients</td>
<td>85-100%</td>
<td>85-100%</td>
<td>85-100%</td>
<td>85-100%</td>
</tr>
</tbody>
</table>

Table 3-2: Consulting Roles and Responsibilities
There were some similarities but also key differences between consultancy settings and grades. All three consultancies were structured according to industry sectors e.g., Insurance, Energy and Utilities, Central Government with cross-cutting capability teams e.g., Business Consulting, Project management. Management consultants were aligned to sectors except those below Manager grade in Achieve and Perform who formed a pool of resource for utilisation in any sector. The focus of recruitment differed between settings. Protect recruit those with consulting or relevant experience. They also have an established scheme for annual graduate intake. Perform recruit those with previous management consulting experience at one of the large, top ten consultancies. Achieve recruit those with lean and six sigma experience in industry and MBA graduates.

Manager grades and below were expected to contribute towards internal team leadership, knowledge and service offer development. This was not mandatory for grades below Manager in Achieve. All grades were expected to contribute in some way to people management. Performance management and career development were competency based in Perform and Protect but relied on patronage and having the support of a senior sponsor rather than structured criteria in Achieve. All grades were expected to contribute in some way to business development with the exception of Protect where the move towards consulting led selling was in progress. Managers were responsible for leading one or more client engagements. Senior Consultants might be called upon to lead a smaller client engagement and were sometimes solo on client site. All grades in all settings were targeted on utilisation even Directors who were expected to bill an average of 25% of their time to clients. Other grades were expected to be fully utilised after allowing time for training.
3.4.6 Selection of research participants

I outline how participating management consultants were recruited and how their informed consent was obtained.

I followed up with the CEO, or nominated representative, of each consultancy to arrange a face-to-face meeting. The purpose of the meeting was to discuss the aims and objectives of the research using the Research Information Sheet in Appendix 1, the criteria for selection of participants, how the criteria might be applied, and the arrangements for obtaining informed consent. When sourcing the sample, the focus of the research was on the dual client-facing and consultancy-facing role of the management consultant. It was only later during data analysis that it became evident management consultants must balance their participation between three systems: their client, consultancy and personal systems of engagement.

In all cases the CEOs or their representatives selected participants that met the criteria. This raised the important ethical consideration of gaining informed consent by ensuring that nominated participants understood the aims and objectives of the research, what participation entails, its voluntary nature, how anonymity is protected and any other information that helps consultants reach an informed, consensual decision to participate (Robinson, 2014). The approach to obtaining informed consent differed slightly for each consultancy setting. I therefore ensured that potential participants in all consultancy settings received the Research Information Sheet and Consent form approved by the Open University Human Resource Ethics Committee (HREC) shown in Appendix 2 before they agreed to an interview. The information sheet and consent form emphasize the voluntary nature of participation and I reinforced that participation was voluntary in my follow-up communications with participants. I followed up by e mail and in some cases also by
telephone to arrange a suitable time and place for an interview. Approximately two days before each interview I sent a further email reminding the participant of the aims and objectives of the research with bullet points describing the topics to be discussed.

Qualitative interviews require self-disclosure and some nominees may have chosen not to participate resulting in self-selection bias. Robinson (2014) claims that self-selection bias is not possible to circumvent in interview-based research, as voluntary participation is central to ethical good practice, therefore all a researcher can do is be aware of the possibility for bias and consider its possible impact on findings and generalisability. In the event all nominees made the decision to participate. There were no financial incentives. The main incentive for consultancies and consultants to participate was that output from the research that is relevant to practitioners, will be provided and this may highlight improved ways of working for consultants and indirectly help consultancies with the development and retention of consultants.

The details of the participating management consultants recruited from each of the consultancy settings was as follows:

**Achieve**

When I held my initial meeting with the CEO of Achieve to discuss the aims and objectives of the research, he identified the Insurance sector team as being representative of the consultancy as a whole. The insurance team was one of five sector teams within the consultancy and specialised in operational improvement and transformation in the insurance industry. The CEO, with the help of the sector lead, identified ten potential participants ranging in grades and considered to be demographically representative of the consultancy as a whole. All participants were management consultants and permanent
employees of the consultancy. As mentioned above, previous consulting experience is not mandatory in Achieve and for six of the participants this was their first consulting position. In Table 3-3 below I provide a breakdown of research participants from Achieve in descending order of seniority:

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Grade</th>
<th>Age</th>
<th>Time at consultancy (Years)</th>
<th>Previous Consulting experience</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harvey</td>
<td>Director</td>
<td>40-50</td>
<td>15</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>John</td>
<td>Director</td>
<td>40-50</td>
<td>7.5</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Jill</td>
<td>Manager</td>
<td>30-40</td>
<td>4</td>
<td>No</td>
<td>Female</td>
</tr>
<tr>
<td>Patrick</td>
<td>Manager</td>
<td>50-60</td>
<td>16</td>
<td>No</td>
<td>Male</td>
</tr>
<tr>
<td>Bernard</td>
<td>Manager</td>
<td>40-50</td>
<td>4</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Noel</td>
<td>Senior Consultant</td>
<td>30-40</td>
<td>5</td>
<td>No</td>
<td>Male</td>
</tr>
<tr>
<td>Alice</td>
<td>Senior Consultant</td>
<td>40-50</td>
<td>3</td>
<td>No</td>
<td>Female</td>
</tr>
<tr>
<td>Walter</td>
<td>Senior Consultant</td>
<td>30-40</td>
<td>3</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>June</td>
<td>Senior Consultant</td>
<td>30-40</td>
<td>2</td>
<td>No</td>
<td>Female</td>
</tr>
<tr>
<td>Jack</td>
<td>Senior Consultant</td>
<td>30-40</td>
<td>4</td>
<td>No</td>
<td>Male</td>
</tr>
</tbody>
</table>

Table 3-3: Achieve Research Participants

**Perform**

At my initial meeting with a Senior Partner from Perform to discuss the aims and objectives of the research, the Partner identified a project team within the Energy and Utilities Sector Team as representative of the consultancy and, with the help of the sector lead, identified eight potential participants ranging in grades and considered to be demographically representative of the consultancy as a whole. All participants were management consultants who were permanent employees of the consultancy. In Table 3-4 below, I provide a breakdown of research participants from Perform in descending order of grade seniority:
<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Grade</th>
<th>Age</th>
<th>Time at consultancy (Years)</th>
<th>Previous consulting experience</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nigel</td>
<td>Director</td>
<td>30-40</td>
<td>2.5</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Rula</td>
<td>Manager</td>
<td>20-30</td>
<td>4</td>
<td>Yes</td>
<td>Female</td>
</tr>
<tr>
<td>Simon</td>
<td>Manager</td>
<td>30-40</td>
<td>1.5</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Neville</td>
<td>Manager</td>
<td>20-30</td>
<td>1</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Anna</td>
<td>Manager</td>
<td>20-30</td>
<td>3</td>
<td>Yes</td>
<td>Female</td>
</tr>
<tr>
<td>James</td>
<td>Senior Consultant</td>
<td>20-30</td>
<td>1.5</td>
<td>Yes</td>
<td>Male</td>
</tr>
<tr>
<td>Kylie</td>
<td>Senior Consultant</td>
<td>50-60</td>
<td>0.5</td>
<td>Yes</td>
<td>Female</td>
</tr>
<tr>
<td>Lennie</td>
<td>Consultant</td>
<td>20-30</td>
<td>1.5</td>
<td>Yes</td>
<td>Male</td>
</tr>
</tbody>
</table>

Table 3-4: Perform Research Participants

Protect

The Head of consulting in the UK identified the Central Government Consulting team as representative of the consultancy and my initial meeting was with one of the leads from a consulting team engaged in a project for a Central Government Department. The consultancy had a long-term contract to run the IT department of the Central Government Department, and this had resulted in a number of shorter-term consulting projects to deliver associated change. The project team was based in central London and participants were commuting daily. There were approximately 120 consultants from the consultancy engaged on client site. Participants were working in mixed teams, usually alongside independent contractors and other consultancies, facing off to the client. The project team lead subsequently held internal discussions with Directors associated with the sector and the project including the Head of Central Government consulting team and the Account Manager. Once agreement had been reached, I was provided with a list of participants that met the criteria for me to contact directly. In Table 3-5 below, I provide a breakdown of the research participants from Protect in descending order of grade seniority:
3.5 **Data collection**

The primary source of data was semi structured interviews. The data collected through interviews were supported by on-line sources, interviews with gatekeepers and operational documents supplied by the consultancies involved in the research.

### 3.5.1 On-line sources

Ahead of the initial meetings with the CEOs of the participating consultancies or their representatives I referred to a number of on-line sources to gain as much background data as possible on the participating consultancies. The websites of the selected consultancies were a useful to understand how they construct their organizational identity and seek to distinguish themselves from other consultancies (Alvesson and Empson, 2008). I found it useful to be aware of the potential impact of identity regulation on the principals with whom I was initially interacting, and also on my subsequent interactions with participants. Referring to social media such as Twitter and Linked In provided data on current topics and developments. The MCA and other consultancy websites were a useful source of
data. All the consultancies involved were very active in MCA matters, hence their willingness to volunteer as participants in the research.

3.5.2 Meetings with gatekeepers

The meetings with the CEOs of the selected consultancies, or their nominated representatives, although primarily aimed at securing research participants, also provided a further source of data. The meetings with each consultancy followed a similar format. Table 3-6 below shows the data collected prior to the meeting and the topics discussed during the meeting:

<table>
<thead>
<tr>
<th>Data collected prior to the meeting</th>
<th>Topics for discussion during the meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governance structure</td>
<td>What do you see as the benefits of the research to the consultancy and consulting in general?</td>
</tr>
<tr>
<td>£ Consulting revenue</td>
<td>What is the operational structure of the consultancy in terms of sector/capability teams?</td>
</tr>
<tr>
<td>Date incorporated</td>
<td>What is the organisational structure of the consultancy in terms of grades, roles, number of consultants at each grade and demographics?</td>
</tr>
<tr>
<td>Growth rate 2017</td>
<td>How are consultants at different grades targeted in terms of utilisation, career development, sales and internal contribution?</td>
</tr>
<tr>
<td># Consulting Employees</td>
<td>What are consultants’ working patterns and locations?</td>
</tr>
<tr>
<td>Contact</td>
<td></td>
</tr>
<tr>
<td>Unique Selling Proposition</td>
<td></td>
</tr>
<tr>
<td>Recent developments</td>
<td></td>
</tr>
<tr>
<td>Service offers</td>
<td></td>
</tr>
<tr>
<td>Sectors of operation</td>
<td></td>
</tr>
</tbody>
</table>

Table 3-6: Topic Guide for Meetings with Gatekeepers

3.5.3 Operational documents

Some consultancies provided operational documents. Where documents such as organizational charts were provided, they were useful to form an understanding of how the consultancy projected themselves internally. Organization charts help to understand
how the consultancy operates and provide context by locating the research within the overall structure of the consultancy. Similarly, performance scorecards showing the range of targets and standards are assessed as part of consultants’ performance appraisal highlight the balance between client-facing and consultancy-facing expectations. However, I found it more informative and more compatible with an approach based on IPA to hear how organizational structures were experienced by participants and how they experienced the balance between the performance demands of competing systems, without having any pre-conceptions I might form from reading documents.

3.5.4 Reflexive notes

I made reflexive notes after each interview. I considered this an important aspect of data collection given that I have seventeen years of experience as a management consultant. Whereas my experience was an advantage in being able to put the accounts of participants into context, I could see that there was the risk of making assumptions. The reflexive notes reflected my overall impression of the interview and how I felt about it, the impact of the participant’s account on my views and where I felt I may have influenced the views of participants. I provide a comprehensive account of the reflexive strategies I adopted in relation to the research later in the chapter.

3.5.5 Semi-structured interviews

The majority of IPA studies use semi-structured, in-depth, one-on-one interviews. The advantage of using semi-structured interviews is that they enable the researcher and the participant to engage in a dialogue in real time, and they afford a flexibility to follow up important issues that come up in the participant’s account. The interviews were recorded, transcribed verbatim and then anonymized by the researcher. IPA requires a verbatim,
semantic transcription of the interview that records all the words said by everyone present and should also include non-verbal utterances such as laughter. This supported line by line analysis of participants’ experiences (Smith, Flowers and Larkin, 2009).

The majority of interviews were conducted during the working day and my undertaking to gatekeepers was that I would try to limit interviews to an hour, although some lasted slightly longer. I agreed that interviews would take place wherever and whenever was most convenient for the participant. The ideal would have been to conduct the interviews at the consultants’ place of work on client site to gain greater insight into the work context and the participant’s perspective, and there were some instances when that was possible. More usually interviews were conducted at the base office of the consultancy or Open University sites in London and Milton Keynes or even a hotel lobby. At the time of the interviews there was a high security alert in place for the Central Government Department that was the location for participants from Protect and it was not therefore possible to conduct interviews on client site. Participants were also under significant work pressure so travel to Open University sites was not feasible. Interviews were therefore conducted in local coffee shops. The liminal nature of these venues, popular with the transient business community for meetings and even job interviews, seemed highly appropriate considering the theoretical framework of the research, although the sound quality left a lot to be desired. The venue seemed to have a relaxing influence on participants. Some referred to the interview as a chat, others commented that it was an enjoyable, reflective hour.

I prepared an interview protocol to ensure that I followed all the necessary processes relating to informed consent. The interview protocol is shown in Table 3-7 below:

108
### Interview Protocol

| At the start of the interview | \begin{itemize} 
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial greeting</td>
<td>Provide personal background (PhD studies, management consulting)</td>
</tr>
<tr>
<td>Check that the participant has received the Information Leaflet and Consent Form. (spare copies available)</td>
<td></td>
</tr>
<tr>
<td>Provide a brief overview of the research, as outlined in the Information leaflet, and ask if the participant has any questions.</td>
<td></td>
</tr>
<tr>
<td>Provide a brief overview of the consent form, especially the voluntary nature and anonymity of the research, and ask if the participant has any questions.</td>
<td></td>
</tr>
<tr>
<td>Ask the participant to sign the consent form (if a signed copy has not already been received).</td>
<td></td>
</tr>
<tr>
<td>Check that the participant is happy for the interview to be recorded and ensure that this is reflected on the form.</td>
<td></td>
</tr>
<tr>
<td>Explain that the interview will be transcribed verbatim and anonymised and that once the interview is transcribed, a copy will be sent to the participant for review to ensure that it reflects their views and is appropriately anonymised.</td>
<td></td>
</tr>
<tr>
<td>Explain that the interview will take approximately one hour.</td>
<td></td>
</tr>
<tr>
<td>Turn on the recorder.</td>
<td></td>
</tr>
<tr>
<td>\end{itemize}</td>
<td></td>
</tr>
</tbody>
</table>

| At the end of the interview | \begin{itemize} 
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Thank the participant for their time and for agreeing to participate.</td>
<td></td>
</tr>
<tr>
<td>Complete demographic and other data that have not emerged during the interview: sex, decade of birth, consulting grade, length of service with participating consultancy, previous consulting and non-consulting experience.</td>
<td></td>
</tr>
<tr>
<td>Check that I can contact them to arrange a follow-up interview if anything from the recording requires clarification, or additional questions emerge.</td>
<td></td>
</tr>
<tr>
<td>Ascertain whether they would prefer the follow-up to be face-to-face or by telephone.</td>
<td></td>
</tr>
<tr>
<td>Confirm contact details for a possible follow-up and where to send the transcription of the interview.</td>
<td></td>
</tr>
<tr>
<td>Advise the participant that when the transcription is sent out, they must respond within two weeks with any amendments.</td>
<td></td>
</tr>
<tr>
<td>Check for times, for example annual leave, when they will be out of email contact.</td>
<td></td>
</tr>
<tr>
<td>\end{itemize}</td>
<td></td>
</tr>
</tbody>
</table>

### Table 3-7: Interview Protocol

I prepared a list of topics to send to participants ahead of the interview. I also prepared a schedule of questions and prompts for me to follow during the interview. This was to help keep the focus on the specific research area. I used supplementary questions when participants found questions too general or abstract. I started the interview with a question about why they became a management consultant to help put them at ease and invite
reflection. I did not necessarily follow the same order for every interview but instead allowed the dialogue to evolve. In line with IPA principles, the participant was the experiential expert, the schedule was there to facilitate the participant giving their account. My role was to probe interesting and potentially important issues as they arose (Smith, Flowers and Larkin, 2009).

The interviews included a variety of question types (Qu and Dumay, 2011). I asked open ended questions supplemented by requests to elaborate answers with examples and accounts of experiences. The initial question for each topic was narrative, for example: “Tell me about your experiences of…”. I used structuring questions to transition between topics, for example: “Now can we talk about your experiences of…?” I used probing questions to clarify responses, for example: “What do you mean when you say…?” I used evaluative questions to encourage experiential accounts, for example: “How did that make you feel?”

Although my experience of management consultants is that they tend to be fairly resilient, the research was concerned with participants’ accounts of their experiences and invited disclosure. I therefore monitored how the interview was affecting the participant. This sometimes meant having to avoid pursuing some questions about for example, aspects of personal life, where the participant was somewhat resistant because of current domestic issues they were experiencing.

My research question refers to using conceptions of liminality to illuminate how management consultants experience and navigate between competing systems of engagement. Interviews therefore required a reflexive approach where various theoretical viewpoints could be considered. Alvesson (2003) argues that without a theoretical understanding, any use of interview material risks being naive, and interpretations of it
rest on shaky ground. When constructing the interview schedule, I therefore mapped the interview questions to my research questions and also to existing theory on liminality to ensure that the questions and topics to be covered would meet the research aims and objectives. The mapping is shown in Figure 3-2 below:
Figure 3.2: Interview schedule mapped to research questions and theory
3.5.6 Data Management

Data were managed in accordance with Open University and General Data Protection Regulations (GDPR). A Data Management Plan was produced and approved in December 2018 ahead of the commencement of data collection. The data comprised: original recordings of interviews, transcriptions of interviews; hard copy and in some cases electronic versions of signed consent forms; original operational and organizational documents, hard copy and electronic versions, provided by participating consultancies and my own transcribed field and reflexive notes.

Original data for example recordings of interviews, were stored securely on OU servers. Hard copies of consent forms and documents that identify individuals or the consultancy were held securely under lock and key. Data from interviews and fieldnotes were anonymised at the point of transcription. Data were shared with Supervisors using secure cloud-based university systems. Extracts of anonymised data were used in conference papers. This thesis will be shared with examiners and then published on Open Research Online. Original operational and organizational documents not publicly available were not retained. The relevant data were extracted and anonymised and the originals destroyed.

Transcribed and anonymised data from fieldnotes and interviews may be of value to other researchers and will be retained securely on OU servers for 10 years. Original recordings of interviews and consent forms that have not been anonymised were not shared. I am responsible for the data during the period of the PhD. Once the PhD thesis is published and the PhD period ends, responsibility will pass to those responsible for managing research data in the OU.
3.6 Data analysis

In this section I describe how I analysed the data using IPA and the process of moving from codes to themes. I also provide examples of the analysis, how software was used and how the data were managed. I conclude the section with an outline of themes, major themes and superordinate themes emerging from the data analysis.

3.6.1 How data were analysed

In IPA there is no single, prescribed method for working with data. The essence of IPA lies within its analytical focus on participants’ attempts to make sense of their experiences. My analysis followed a step by step approach similar to that outlined in Smith, Flowers, and Larkin (2009). The steps are shown in Figure 3-3, below:

Figure 3-3: Step by Step Interpretative Phenomenological Analysis
Analysis in IPA is a complex, iterative, and multi-directional process that requires in-depth analysis and interpretation of participants’ interpretations of their experiences. I read and re-read each transcript in turn becoming immersed in the data, making descriptive notes about what the participant said, the subject being discussed and my own reflections and observations. I then extended the notes, focusing on the use of language including the use of metaphors, any emotional responses and my own initial interpretations. This aspect of IPA where the researcher tries to interpret and make sense of the participant’s own interpretation of their experience is referred to as a double hermeneutic (Smith, Flowers and Larkin, 2009). I then reviewed the transcript and associated annotations for a third iteration of note taking focusing on engaging at a more interrogative and conceptual level and a higher level of abstraction whilst still grounded in the detail of the participant’s account. At this point, having read the transcript several times, I was iteratively interpreting the part in relation to the whole, and the whole in relation to the part in the movement of the hermeneutic circle. My note taking related to how the issues and annotations endorsed, modified, or challenged existing theories and concepts.

I then looked for connections between the emerging themes grouped emerging themes grouping them together into major themes and super-ordinate themes. My selection of themes, major themes and super-ordinate themes was influenced by my research question which refers to the use of conceptions of liminality to illuminate how management consultants experience and navigate between competing systems of engagement. Nevertheless, in line with the idiographic commitment of IPA I kept an open mind and allowed new themes to emerge (Smith, Flowers and Larkin, 2009). The themes that emerged and subsequent iteration between theory and analysis led to the identification of conceptions of liminality from a broader range of domains such as learning and education.
Similarly, there were twenty-eight participants altogether across three consultancy settings. My analysis of the first transcript and identification of themes became part of the hermeneutic circle of understanding and inevitably influenced my analysis of the subsequent transcripts within and across consultancy settings. However, I continued to keep an open mind to maintain the idiographic commitment of IPA, allowing new themes to emerge from each transcript in an iterative process reviewing earlier transcripts in the light of new themes (Smith, Flowers and Larkin, 2009)

In Table 3-8 below I include an example of my annotation of transcripts. This demonstrates the initial note taking and interpreting of interview transcripts and identification of emergent themes outlined in steps 1 to 4 in Figure 3-3. In the right-hand column descriptive notes are in plain text, linguistic notes that focus on the use of language and metaphors are in italics and conceptual notes are underlined. The middle column shows an extract from a participant’s verbatim transcript and the left-hand column was used to note the initial identification of emergent themes:
- Descriptive comments focused on describing the content of what the participant said, and the subject being discussed
- *Linguistic comments focused on exploring specific use of language by the participant*
- Conceptual comments focused on engaging at a more interrogative and conceptual level

<table>
<thead>
<tr>
<th>Emergent Themes</th>
<th>Transcript</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspended between work and personal systems</td>
<td>Just parked it, essentially. I waited to see what project I went on before I... well after university I moved back in with my parents because they’re quite near to London. And then essentially, because I was abroad, I just didn’t ever bother renting or anything. I just stayed in hotels all the time... Took my car off the road. Put everything in storage and such. It’s kind of an all or nothing really. And it was good, and it was good for my career and I got accelerated promotion with &lt;Name of previous consultancy&gt;. Following those releases, I went to Italy for almost a year, worked there. Which was good, again, quite similar. Hard work but partying hard and no life at home at all. Probably the biggest, the thing that I reflected on is that I just wasn’t able to maintain a relationship with anyone in the UK. It was a perpetually single life. So it was either date someone you worked with or date non-one because it’s just not sustainable. But I also got to stay in Milan and Paris and fly every other weekend and things like that. Based on my priorities at that time, it was a good trade-off.</td>
<td>Lived in hotels, put everything in storage, took car off the road</td>
</tr>
<tr>
<td>Trade-off between life experience and career progression and engagement with personal system in UK</td>
<td></td>
<td>Unable to maintain relationships in UK. Perpetually single life.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Good trade-off</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“Just parked it” (home life)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>It’s kind of an all or nothing really... Hard work but partying hard and no life at home at all</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Separated from personal life, creating a different life away from home</td>
</tr>
</tbody>
</table>

**Table 3-8: Example of Annotating Transcripts**
The initial analysis of transcripts generated a large number of emergent themes and I therefore sought out suitable Qualitative Data Analysis Software to support my analysis. NVivo is one such option that I had already experienced. Whilst NVivo is not entirely compatible with the in depth idiographic nature of IPA, it can be used alongside the more manual methods associated with IPA (Jackson and Bazeley, 2019). I therefore devised a somewhat hybrid use of NVivo. Although it is possible to use the annotation function in NVivo for note taking, it is not possible to search on or code the content of annotations and valuable data is therefore inaccessible. However, I did use the node function in NVivo to support the process of grouping emerging themes into major themes and superordinate themes for individual transcripts and subsequently for the group. I did this by entering emerging themes and my descriptive, linguistic and conceptual notes into NVivo as nodes. This facilitated the subsequent identification and grouping into major themes and superordinate themes, as shown in Figure 3-4, below:

Figure 3-4: Themes in NVivo
3.6.2 Emerging themes from the data analysis

In Table 3-9 below I show the themes, major themes and superordinate themes identified as I moved from one transcript to the next, within a consultancy setting and then across consultancy settings:
<table>
<thead>
<tr>
<th>Themes</th>
<th>Major Themes</th>
<th>Superordinate Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experiencing pressure to rapidly understand the client organisation</td>
<td>Experiencing the transition between not knowing and knowing</td>
<td>Engaging with the client and the client organisation</td>
</tr>
<tr>
<td>Experiences of learning to cope with not knowing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing the pressure of unclear approach, scope and expected outcomes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of leveraging outsider perspective and expertise</td>
<td>Experiences of establishing a client-facing persona</td>
<td></td>
</tr>
<tr>
<td>Experiences of adapting to client preferences and expectations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of working with professional distance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of building client trust</td>
<td>Experiences of seeking to build a collaborative relationship with the client</td>
<td></td>
</tr>
<tr>
<td>Experiences of problematic relationships with the client</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of coping with multi-supplier relationships with the client</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The nature of competing consultancy-facing and client-facing priorities</td>
<td>Experiencing and managing the tension between client-facing and consultancy-facing priorities</td>
<td></td>
</tr>
<tr>
<td>Experiences of managing competing client-facing and consultancy-facing priorities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing guilt when engaging with consultancy-systems on client site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing pressure to be visible</td>
<td>Experiences of coping with consultancy performance and career development expectations</td>
<td>Navigating between the demands of client and consultancy</td>
</tr>
<tr>
<td>Experiencing pressure to be utilised and develop skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of career progression</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing belonging to a consultancy team community on client site</td>
<td>Experiencing different kinds of belonging and separation</td>
<td></td>
</tr>
<tr>
<td>Experiences of belonging to an informal consultancy network</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing feeling detached or abandoned between client and consultancy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of working away from home</td>
<td>Experiencing the challenges of the consulting lifestyle</td>
<td></td>
</tr>
<tr>
<td>Experiences of working long hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing travel between work and personal systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing different levels of control</td>
<td>Experiences of managing work-life boundaries</td>
<td>Striving for work-life balance</td>
</tr>
<tr>
<td>Perceiving gender as a barrier to a career in consulting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiences of setting firm boundaries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiencing support from home</td>
<td>Experiences of making the consulting lifestyle work</td>
<td></td>
</tr>
<tr>
<td>Experiencing ways of maintaining wellbeing</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Table 3-9: Emerging Themes</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

120
3.6.3 Incidence of themes by consultancy setting and participant

The final step in the analysis, step 9 in Figure 3-3, was to show the incidence of themes across participants for each consultancy and across consultancy settings. This analysis is shown on the next three pages. Differences between settings and between different consultancy grades are interpreted in the Findings chapters and explored further in Chapter 7: Discussion.
<table>
<thead>
<tr>
<th>Major Themes</th>
<th>Themes</th>
<th>Achieve</th>
<th>Director</th>
<th>Manager</th>
<th>Senior Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experiencing the transition between not knowing...</td>
<td>Experiencing pressure to rapidly understand the client organisation</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of learning to cope with not knowing</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing the pressure of unclear approach, scope and expected</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>outcomes</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of leveraging outsider perspective and expertise</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of adapting to client preferences and expectations</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of working with professional distance</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of building client trust</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of problematic relationships with the client</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of coping with multi-supplier relationships with the client</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing guilt when engaging with consultancy-systems on client site</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>The nature of competing consultancy-facing and client-facing priorities</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiences of managing competing client and consultancy priorities</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing different kinds of belonging and separation</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing belonging to a consultancy team community on client site</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing belonging to an informal consultancy network</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td></td>
<td>Experiencing feeling detached or abandoned between client-consultancy</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td>Experiencing pressure to be visible</td>
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<td>x</td>
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<tr>
<td></td>
<td>Experiencing pressure to be utilised and develop skills</td>
<td></td>
<td>x</td>
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<td>Experiences of career progression</td>
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<td></td>
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<td></td>
<td>x</td>
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</tr>
<tr>
<td></td>
<td>Experiencing feeling detached or abandoned between client-consultancy</td>
<td></td>
<td>x</td>
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<tr>
<td></td>
<td>Experiencing ways of maintaining wellbeing</td>
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Table 3-10: Incidence of emerging themes in Achieve
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<th>Major Themes</th>
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<th>Senior Consultant</th>
<th>Consultant</th>
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<td></td>
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<td></td>
</tr>
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<td>Neville</td>
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<td></td>
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<td></td>
</tr>
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<td></td>
<td></td>
<td>Lennie</td>
<td></td>
</tr>
<tr>
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<td>Experiences of working with professional distance</td>
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<td>X</td>
<td></td>
<td></td>
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</tr>
<tr>
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<td>Experiencing pressure to be visible</td>
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<td>Experiences of career progression</td>
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<td>Experiencing feeling detached or abandoned between client/consultancy</td>
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<td>Experiencing different levels of control</td>
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<td></td>
<td>Experiences of setting firm boundaries</td>
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<tr>
<td></td>
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<td></td>
<td>X</td>
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<tr>
<td></td>
<td>Experiencing ways of maintaining wellbeing</td>
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Table 3-11: Incidence of emerging themes in Perform

123
<table>
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<tr>
<th>Major Themes</th>
<th>PROTECT</th>
<th>Director</th>
<th>Senior Manager</th>
<th>Manager</th>
<th>Senior Consultant</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experiencing the transition between not knowing and knowing</td>
<td>Experiencing pressure to rapidly understand the client organisation</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Experiences of establishing a client-facing persons</td>
<td>Experiences of adapting to client preferences and expectations</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Experiences of seeking to build a collaborative relationship with the client</td>
<td>Experiences of working with professional distance</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Experiences of coping with consultancy-performance and career development expectations</td>
<td>Experiences of building client trust</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Experiences of coping with consultancy-performance and career development expectations</td>
<td>Experiences of coping with multi-supplier relationships with the client</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Experiences of coping with consultancy-performance and career development expectations</td>
<td>Experiences of coping with multi-supplier relationships with the client</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>Experiencing different kinds of belonging and separation</td>
<td>Experiencing belonging to a consultancy team community on client site</td>
<td>x</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>Experiencing different kinds of belonging and separation</td>
<td>Experiences of belonging to an informal consultancy network</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Experiencing the challenges of the consulting lifestyle</td>
<td>Experiencing feeling detached or abandoned between client-consultancy</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td>Experiencing changes in the client organisation</td>
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<td>x</td>
<td>x</td>
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<td>Experiencing travel between work and personal systems of engagement</td>
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<td>Experiencing gender as a barrier to a career in consulting</td>
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<td>Experiencing the challenges of the consulting lifestyle</td>
<td>Experiences of setting firm boundaries</td>
<td>x</td>
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<td>Experiencing the challenges of the consulting lifestyle</td>
<td>Experiencing support from home</td>
<td>x</td>
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</tr>
<tr>
<td>Experiencing the challenges of the consulting lifestyle</td>
<td>Experiencing ways of maintaining wellbeing</td>
<td>x</td>
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</tbody>
</table>

Table 3-12: Incidence of emerging themes in Protect
3.7 Reflexivity

Immediately prior to commencing my PhD journey I was a practicing management consultant with a global firm for fifteen years and then as an independent consultant for a further two years. I considered reflexivity to be an important aspect of the research. My goal was to monitor the effects of previously being an insider in a way that enhanced the accuracy and credibility of the research rather than undermining it (Berger, 2013)

Corbin and Strauss (2008: 33) claim “objectivity in qualitative research is a myth” and that researchers bring their own paradigms to the research situation including perspectives, training, knowledge, and biases. These aspects of self then become woven into all aspects of the research process (Guba and Lincoln, 1998 cited in Corbin and Strauss, 2008). The question then becomes how to use experience, which offers potentially deeper understanding of the phenomenon, whilst not imposing the researcher’s experience on participants (Berger, 2013).

Pillow (2003) claims reflexivity has been accepted as a method that qualitative researchers can and should use to legitimise, validate, and question research practices and representations. Cunliffe (2016) defines reflexivity as questioning what might be taking for granted, what is being said and not said and examining the impact this has or might have. The aim of self-reflexivity is for the researcher to examine the nature of their relationship with research participants and how their presence influences and changes people and practices and how the researcher is influenced by the research participants (Cunliffe, 2016). She claims that reflexivity offers a way of bringing to the fore our moral and ethical responsibility for others and that not engaging in reflexivity could result in misrepresentation of the research and possible harm to participants.
Pillow (2003) proposes a research strategy of reflexivity as recognition of self. I pursued the idea of Recognition of self in this research in the form of careful self-monitoring and systematically seeking out my assumptions based on my own experiences as a management consultant being careful and using my notes and reflections of previous interviews to ensure not to impose my views during interviews or in interpreting their accounts. Reflexivity as recognition of self also involved recognising power relationships. I was older and more experienced as a management consultant than many of the research participants. There was also the possibility of perceived power by association. My presence as a researcher was sponsored initially by the CEO of the MCA, of which all participating consultancies were active members, and subsequently by their own CEO or equivalent. In one consultancy setting the Head of their Consulting Practice turned out to be an ex-colleague. I mitigated the possible impact of these relationships by focusing on putting participants at ease early in the interview, and opening with easier questions, for example: Why did you want to become a consultant?

I found it relatively easy to build rapport with the research participants as much of what they had to say resonated with my own experiences. Pillow (2003) claims that a specific form of self-reflexivity emerges where the researcher situates their understanding of their research out of similar personal experiences with their subjects as in my case. Although the findings are inevitably “contaminated” with my own lived experiences, Ellingson (1998, cited in: Pillow, 2003) argues that readers should be assured that this results in a rich, complex understanding of one’s own experiences that heightens comprehension of those of participants. I did experience a few “light-bulb” moments during the interviews, reassured by the accounts of participants and thinking “that is how I felt when that happened, it wasn’t just me”.

126
As already explained, I made reflexive notes after each interview. The notes recorded my overall impression of the interview and how I felt about it, the impact of the participant’s account on my views and where I felt I may have influenced the views of participants. I also highlighted any surprising responses where the experiences of participants in relation to certain situations differed from my own. Taking time to reflect and make notes after each interview assisted interpretation during subsequent analysis of the data (Smith, Flowers and Larkin, 2009).

A further strategy proposed by Pillow (2003) as key to legitimization and validity claims is reflexivity as recognition of other. She sees the basis of why we do research as predicated upon being able to know, understand and represent the other and let them speak for themselves. Pillow (2003) maintains there is an unequal power relationship in research and a need to continually question the capability of the participant to define themselves. The research was co-developed with participants as far as possible. The research aims were co-developed with the Practice Director and Human Resource practice representative of the consultancy originally identified for ethnographic research. Although that particular consultancy did not subsequently participate in the research, the aims and objectives co-developed had relevance for both practice and theory. Participants were advised of the key topics for discussion beforehand so that they were able to prepare and were less likely to feel at a disadvantage. The “interview” was an exchange where my aim was to do as little of the talking as possible and to give as much power over the conversation as I could to the participant. Comments at the end of the interview included “that was a nice reflective hour” and “we don’t often get chance to talk about all this stuff”. I also shared the transcripts of their interview with the participant so that they could confirm that in their view it was an accurate reflection.
It is never possible to completely transcend one’s own subjectivity, and reflexivity during subsequent phases of the research was also important. My analysis and writing up was subject to regular supervisory reviews and feedback. I also presented my research at a number of internal colloquia and external conferences and received feedback from reviewers and broader conference audiences. Reflexivity during this phase closely mirrored the sequential process proposed by Hibbert, Macintosh and Coupland (2010). They see reflexivity as the interaction between reflection and recursion. Reflection where we engage in an examination of our ways of doing. Recursion as a process of defining something in terms of itself and returning to our ways of doing. They claim the difference between reflection and reflexivity is that reflexivity is recursive.

Hibbert, Macintosh and Coupland (2010) propose four modes of reflexivity: repetition; extension; disruption and participation. The first mode was repetition where reflexivity was intended but my analysis of the data was self-focused and recursively passive and therefore stayed within my own accepted boundaries. My analysis moved into extension mode which, whilst still self-focused was more actively recursive and analysis became more revelatory, a feeling of being struck as surprising findings challenged or extended interpretations based on my own experiences. The next reflexive mode was disruption where I received feedback from supervisors and broader conference audiences that challenged my interpretations and beliefs. The focus here was on other and was recursively active. In this mode I experienced doubt and even abandoned previously held beliefs. An example of this was my strongly held belief that liminality as a concept is a temporary phenomenon and any idea of it becoming a permanent state would bring that very liminality to an end. This whilst being in denial about everything in my analysis that was indicating a far more complex picture. The final mode was participation where reflexivity was still focused on other but recursively passive, trusting the views of others.
whilst still able to reverse into the previous mode of disruption and rejection where I experienced more doubt and sought further feedback.

3.8 Reliability, validity, and generalisability

Reflexivity is one way to legitimise, validate, and question research practices and representations (Pillow, 2003). When assessing the quality and generalisability of research Bryman and Bell (2015) note that positivist criteria such as validity, external validity, reliability and objectivity are inappropriate for qualitative research. Lincoln and Guba (1985, cited in Bryman and Bell, 2015) propose alternative criteria for assessing qualitative research linked to trustworthiness. Credibility in terms of how believable the research is, replaces validity. Transferability and the extent to which findings apply to other contexts is in place of external validity. Dependability and whether the findings are likely to apply at other times is in place of reliability. Confirmability and whether the researcher allowed their own values to intrude to a high degree is in place of objectivity. Hammersley and Atkinson (2007) also interpret validity as credibility, requiring evidence and plausibility, and proposes relevance as a criterion in terms of the importance of the topic or contribution to literature.

I supported the credibility of the research by including verbatim quotations from the transcripts of interviews with participants alongside my interpretations of their experiences to support my findings. My aim in recruiting practicing management consultants to participate in the research was to further enhance accuracy and confidence in the findings. I supported transferability of the research by including rich, thick descriptions of the research settings and the experiences of participants. Creswell and Poth (2018) propose generating rich, thick descriptions as a relevant strategy for a qualitative study. They argue that when the research setting is described in detail by the
researcher, this enables the reader to decide whether findings can be transferred to different settings with similar characteristics. Robinson (2014) argues that transparency about the approach to sampling is central to the transferability of an interview study. I gave a transparent account of the sampling process and my role in sourcing the sample. Robinson (2014) believes a fully articulated contextualised target population prevents unwarranted claims of transferability. Dependability relates to the consistency of the research process. My approach was fully consistent with the rules and conventions of qualitative methodology. I also applied rigour in terms of the appropriateness of the sample, the quality and consistency of the interview process, the completeness of the analysis and the consistence of the overall approach with the research question (Yardley, 2000). Ensuring confirmability and the extent to which researcher values have intruded once again raises the importance of reflexivity and the strategies I described in the previous section. Finally, I believe management consultants’ experiences of balancing their participation across multiple systems is relevant and contributes to theory on management consultancy, liminality and to the body of business and management studies using IPA.

There are a range of scholarly views on the transferability of case study research. Eisenhardt and Graebner (2007) argue that single qualitative case studies are useful for producing theory that may later be tested using quantitative methods. They see inductive and deductive logics as mirrors of one another with inductive logic building new theory from data and deductive logic completing the cycle by using data to test and evaluate theory. They concede that multiple cases create more robust theory because the propositions are more deeply grounded in varied empirical evidence. I selected three consultancy settings for the research and many of the findings were common across all three. This demonstrated that findings were not idiosyncratic to one setting. There were
some differences and exploring the possible reasons for these differences facilitated broader investigation of the research question. The inclusion of three consultancies that differed in size, specialism and aspects of their approach, for example the expectation that management consultants should make an internal contribution, may increase the transferability of findings (Tsang, 2014).

3.9 **Ethical considerations**

I worked with the Open University Human Research Ethics Committee (HREC) to agree the final shape of the research to achieve a favourable opinion. In shaping the research I made sure that my approach complied with key ethical principles as defined by Easterby-Smith, Thorpe and Jackson (2015) and Bryman and Bell (2015). Ethical principles fall into four main categories: avoiding harm; gaining informed consent; avoiding invasion of privacy and protecting the integrity of the research community by avoiding deception, declaring any conflicts, honesty and transparency in communications and avoiding any false reporting.

When negotiating access, care was taken to be completely open and transparent about the research focus, aims and objectives, methods and how the outputs would be disseminated. The research was overt, and research participants were fully briefed beforehand, so they were able to play their part in ensuring the research successfully met its aims and objectives. Management consultants participating in the research were provided with sufficient information to give informed consent. I provided an information leaflet and obtained signed consent forms from each participant before the research started. The consent form and information leaflet made it clear that participation was voluntary, and participants had the right to withdraw at any stage up to the point where the data provided has been processed and could no longer be extracted. The interview protocol was
designed to ensure that participants were in a position to be able to give informed consent. The Information Leaflet and consent form is included as Appendix 2. These documents guarantee confidentiality and anonymity and the promise that real names will not be used and will be substituted by pseudonyms in the research report.

There is an ethical responsibility not to publicise or circulate information that is likely to harm the interests of individual informants (Bell and Bryman, 2007). Care was taken to handle negative findings sensitively. Transcripts of interviews were sent to participants for them to confirm that the content represented their views. This was an opportunity for them to propose amendments or raise concerns. The research may also provide opportunities for greater collaboration with and benefits for the consultancies involved. Key findings will be shared with participating consultancies and elements of the research may help to provide greater insight into the particularly high levels of attrition experienced by the consulting industry. The evaluative aspect of the research may also identify working practices that help consultants to manage competing demands on their time, identify development opportunities for career development and ways of working flexibly to achieve greater work-life balance and wellbeing.

3.10 Chapter Conclusion

In this chapter I set out my selected methodology to meet the aims of the research and the reasons for my choices. The methodology uses an engaged interpretative research paradigm, an inductive and abductive logic of enquiry and a qualitative methodological framework based on IPA. These approaches support the research aim of understanding how management consultants navigate between the competing demands of their client, consultancy and personal systems of engagement. Whereas IPA assumes a homogeneous sample, my approach embodies an element of logic of comparison by including three
research settings to introduce some areas of possible difference. The primary sources of data were semi-structured interviews, operational documents and my own reflexive notes. In line with the principles of IPA, data analysis focused on interpreting participants’ own interpretations of their lived experiences of being a management consultant. I also outlined the steps taken to ensure the quality of the research and high ethical standards.

Three superordinate themes emerged from the research and in the next three chapters I present the findings of my research. The structure of each chapter follows one of the three superordinate themes emerging from the analysis. These are shown in Figure 3-5 below:

![Figure 3-5: Themes emerging from the analysis](image)

I introduce each chapter with an overview of major themes relevant to the superordinate theme being covered. I then introduce each major theme in turn. I present findings for each theme associated with the major theme supported by verbatim extracts from the
transcripts of participants. These are shown in italics. In the presentation of findings, I
draw out differences between consultancy settings and between consulting grades. I
conclude each chapter with a summary of the key findings for discussion.
4 Engaging with the client and the client organisation

4.1 Chapter introduction

In this chapter I present the findings of the first of three superordinate themes which concerns management consultants’ experiences when they engage with the client and client organisation. I first present data on their experiences when joining a new client engagement, knowing very little about the client organisation and how the aims and objectives of the engagement fit in, and how they learn to cope with ambiguity and leverage their outsider perspective and expertise. In the second major theme, I explore management consultants’ experiences of transitioning to a client-facing persona, adapting their approach, image and even the presentation of their personality to meet the client’s preferences and expectations, whilst at the same time working with what they perceive as professional distance. In the third major theme I present data on management consultants’ experiences of seeking to build a collaborative, trusting relationship with the client, how these experiences were often problematic and sometimes complex, especially when multiple suppliers with their own vested interests were involved.

The structure of the section follows the emerging themes from the analysis outlined in chapter 3: Methodology, shown in Figure 4-1 below:
4.2 Experiencing the transition between not knowing and knowing

In this major theme I first present data on the experiences of consultants when they start a new client engagement and their perception of not yet knowing about the client, and the client organisation and experiencing feelings of pressure to rapidly understand the client’s problems, the power structures within the client organisation and the nature of the engagement. I then present data on how management consultants learn to cope with the ambiguity of not knowing how everything works. I also present data on how experiences of the transition between not knowing and knowing were made more complex when the consultant’s perception was that they did not share a common vision of the approach, scope and outcomes of the engagement with the client. Finally, I present data on how management consultants aim to make progress with the client by leveraging their outsider perspective and expertise.
4.2.1 Experiencing pressure to rapidly understand the client organisation

When joining a new client engagement, consultants experienced a steep learning curve as they sought to understand the client organization and how the aims and objectives of the project might be achieved. Consultants experienced excitement and anticipation at the prospect of a new challenge and meeting new people. They also experienced doubt and uncertainty and felt they were in a weak position of not knowing. Warren perceived being able to cope by relying on his existing knowledge and what he referred to as core consulting skills, structured ways of working such as interviews with key stakeholders and cross functional workshops aimed at gaining as much information as possible from the client as quickly as possible:

> You are always starting from a weak position... all you can do is rely on your consulting principles and core skills and bring whatever knowledge you have to the role (Warren, Manager, Protect)

The experience of joining a client engagement was especially traumatic for new consultants who did not always have consulting skills and experience to rely on. The experience of going straight on to a client engagement following induction left a deep impression on Geoff who still vividly remembered his first project even though it was fourteen years earlier:

> ...this feeling of being thrown in at the deep end to float, swim, not swim

(Geoff, Senior Manager, Protect)

When transitioning to a new project, consultants reported referring to many sources to research the client organisation and gain a broader perspective. However, as Kylie was
quick to point out, if you are new to the client, as a consultant you don’t have the tacit knowledge about the organisational culture, and that puts you at a disadvantage:

You don’t have the tacit knowledge...if you know the organisational culture it means you know what the true power structures are, how to get things done (Kylie, Senior Consultant, Perform)

Management consultants perceived that clients were paying high fees and expected them to know all the answers. They felt under pressure to rapidly transition between not knowing much about the client or the engagement and knowing enough to demonstrate value and credibility:

you do have to hit the ground running, which is tricky…I think as a consultant there is an assumed view that you have all the answers because that is what you are being paid for (James, Senior Consultant, Perform)

Keira recalled her experience of going on to client site on her first day with the consultancy following induction and feeling a sense of danger, excitement, and anxiety in what she perceived as a complex strange environment, whilst still not knowing very much about the consultancy she was working for. Keira experienced the realisation that she was between two systems. She remembers wondering if the client realised it was her first day:

I am not sure that the client realised that my day one there was my day one in the work environment ... But learning very quickly that there was the balance between working with the client and that client facing aspect, but still trying to get on my feet and trying to understand everything internally as well (Keira, Senior Consultant, Protect)
4.2.2 Experiences of learning to cope with not knowing

Management consultants quickly realised that they must learn to cope with the ambiguity of joining a new client engagement and knowing very little about the client or the client organization. Alistair’s view as head of sector was that if consultants were not able to cope with the ambiguity of not knowing, they simply would not survive:

*If you can deal with ambiguity and you can just get on with the stuff and you seem to be able to pick things up quite quickly and run with it and you become that safe pair of hands then that is when you stand a chance of succeeding. It is those people who are a little bit more high maintenance that tend to fall off because we don’t necessarily have the time to spoon feed them (Alistair, Director, Protect)*

Management consultants perceived needing to be able to think very quickly “on their feet” to cope with ambiguity and be able to respond appropriately to the client when starting a new client engagement. Some felt able to draw on their experience others found it more difficult. Geoff recalled feeling quite anxious, nervous and worried about starting a new project. Geoff’s perception was that once he had experienced working across a broad range of projects, he became more confident:

*I never knew what to expect. I was always very nervous... sort of anxious and worried ... it was only once I had done projects across all of those different skills... after that point thinking actually ... I get this now. I know what’s required from me and I can now have an intelligent conversation with the client and hold my own. (Geoff, Senior Manager, Protect)*
Management consultants perceived that they became more skilled at coping with the ambiguity of a new client engagement with experience. Sam felt the main thing he had learned working on client sites for a number of years was that you just have to deal with the ambiguity and become comfortable with not knowing how everything works. When Sam joined his current project, he knew nothing about the product being delivered until he arrived on client site:

you come in and you won’t know everything, and you just have to deal with that ambiguity and rely on the team around you ... you have to become comfortable with not knowing how everything works..... I think once you have done that a few times you know that you can do it... to begin with I wasn’t comfortable with it. As time has gone on, I am more comfortable with it. (Sam, Manager, Protect)

4.2.3 Experiencing the pressure of unclear scope and expected outcomes

Management consultants sometimes experienced clients who they perceived were quite vague about what they wanted or what they wanted was not suitable. Kylie’s perception was that it was not unusual for the client to need some help defining exactly what they want beyond the initial agreement and that was acceptable as long as the client did not have unrealistic expectations about delivery timescales:

As long as the client doesn’t want it done in a month and is willing to pay,
you don’t say no I’m sorry you don’t have a clear engagement objective so I’m not going to take the work (Kylie, Senior Consultant, Perform)

However, the time bound nature of consulting projects meant that Management consultants found the transition between not knowing and knowing was more stressful
when they perceived they did not share a common vision of the approach, scope and
expected outcomes of the engagement with the client:

> whilst you try to gain clarity on scope ... the conversations they've held
beforehand haven't been clear, or they haven't made a clear decision on
why they're bringing in a consultant. So, it is an eight-week project, and you
end up spending the first two weeks sorting that out before you can do what
we need to do (Jill, Manager, Achieve).

Lennie experienced intense pressure on an engagement where senior people within the
consultancy allowed scope to expand in an uncontrolled way, without providing adequate
resources:

> so ...allowing the client to say: “actually, we could use this as well, we
could use this as well” without allocating additional resource ... it was very
intense (Lennie, Consultant, Perform)

Early in her career Anna experienced a client engagement that was not clearly scoped but
did not feel sufficiently confident or experienced to discuss this with the client. Anna
experienced such intense pressure that she suffered a breakdown:

> ... the most pressure has come where the role has not been scoped out fully
enough, not necessarily set up for success because the client didn’t
understand what they wanted... and being too junior and not having the
confidence of going okay, this doesn’t make sense... And not being able to
have that conversation when I first started led to me burning out... (Anna,
Manager, Perform)
4.2.4 Experiences of leveraging outsider perspective and expertise

Consultants experienced being able to leverage the credibility they gained from their outsider status and their consulting expertise, to make progress with the client. Jack felt that consultants automatically have a degree of credibility by being external and that not knowing much about the detail of the client’s operation was an advantage. Jack was aware that he needed to combine his knowledge with that of the client to make progress:

You know, you are never going to understand the business as well as the client does. But sometimes that is a help, they can be a little bit too immersed and unable to see the problems. Sometimes, the best way is to put the pieces in front of them, try and steer them to the conclusion you have already come to but let them put the pieces together (Jack, Senior Consultant, Achieve)

Rena’s experience was the consultant label meant that, despite being significantly more junior in years and experience compared with others in the team, they expected her to take the lead even though she did not really feel qualified:

...they see you are with this company ...and they just think “she must be more experienced than me” but they kind of expect you to lead and you think you know, I am not really qualified to do this... (Rena, Senior Consultant, Protect)

Patrick’s perception was that, to maintain his outsider perspective, it was important not to spend too long on one project. Patrick had experienced seeing Senior Managers in companies come in and make a difference for six months and then become what he described as “institutionalised”. Patrick felt that consultants ran the same risk:
They are super keen and enthusiastic, and their eyes are wide open...they are seeing things very clearly for the first six months and then they tend to get caught up in the admin, company politics and the long term this and that and they lose sight... we see that all the time in our clients (Patrick, Manager, Achieve)

Management consultants sometimes experienced challenges in working productively with clients when they perceived that the client was not receptive to their outsider perspective. Noel experienced an engagement when the consultancy and the client did not agree on the timescales for implementing the proposed solution. Noel felt that the client was a larger-than-life character who was sure he was right, and this made it difficult to engage. Noel and the team were eventually able to leverage their expertise to develop plans showing the client all the risks and contingencies that would need to be put in place to go at the speed the client demanded, and they were able to agree a compromise:

when the client says you’re here to do this for me and we’re going... you shouldn’t be doing that. So, it was a bit of a tricky situation where we believed the business wasn’t ready to undergo the change the client wanted

(Noel, Senior Consultant, Achieve)

Neville also experienced challenges when he perceived the client considered himself to be an expert in the area and thought he knew best. Neville felt it was important to clarify why the client had brought in consultants and what role they expected consultants to play:

If the client is truly an expert in an area and they expect you to do X, Y and Z...if you truly know less than they do, it is a challenge to know what position you are going in to. Are you just a sidekick getting things done? Is
your team basically just there to pick up things that people don’t have time for, or are you in a position to really challenge and provide value? (Neville, Manager, Perform)

4.3 Experiences of establishing a client-facing persona

In this major theme I explore the experiences of management consultants as they adapt their professional identity to meet what they feel are the expectations of the client whilst working with what they perceive as professional distance.

4.3.1 Experiences of adapting to client preferences and expectations

When joining a new project and building what they hoped will be a positive, collaborative relationship with the client, management consultants understood that they must be flexible to clients’ demands and adapt their approach, their image and even the presentation of their personality to meet the preferences and expectations of the client.:

We talk about being a chameleon because you’ve got to adapt your personality to the circumstance. You have to be yourself from an integrity perspective but then you have to read the sponsor’s preference and make sure that you adapt to what they want (Harvey, Director, Achieve)

June had been with Achieve for just two years. She had followed quite an alternative lifestyle in the past and had a number of piercings. June felt she needed to present a work version of herself that would fit the role of consultant and meet what she perceived as the expectations of the client. She saw herself as wearing a costume:

where a friend of mine might have pink hair, I’m not going to have pink hair because it will set the wrong expectation …I try to dress formal, it’s more
that you wear a costume and dial up or down your personality depending on who you’re with” (June, Senior Consultant, Achieve)

Management consultants perceived that they must adjust their approach to meet the clients’ preferences. For some this meant arranging regular formal meetings and producing in depth reports. Others experienced clients who preferred a less formal relationship, a chat over coffee or a quick update of the key points. Rula perceived that she had become adept at recognising client preferences:

You can quite quickly understand people who have always got time for a cup of coffee and a chat. Whereas some people are rushing around, and it’s a one-page report that shows your value rather than a softer conversation

(Rula, Manager, Perform)

In adjusting to meet clients’ expectations, some management consultants sought to minimise differences between their own circumstances and those of the client. Jack was conscious that there was often a big difference between the remuneration he received as a management consultant and the people he was working with, who were often performing a similar role. Jack took steps not to emphasize differences that he perceived would set him apart from those he needed to work closely with to make progress:

I feel a little bit uncomfortable it is just being a bit mindful about …even how you dress … and try and avoid talking about holidays and cars and houses and that sort of thing… humility is always a good trait in that kind of environment (Jack, Senior Consultant, Achieve)

Adjusting to meet clients’ expectations sometimes extended to the skills and knowledge required to fulfil the role. It was not uncommon for management consultants to find
themselves in a role that was not a good fit or not what they expected. Some experienced the pressure of potential failure and damage to their reputation. Warren joined Protect from a non-consulting background and remembers experiencing a certain amount of panic when he joined his first project and perceived his skills were not fully matched to the client’s expectations. The client had just dismissed a contractor he was not happy with from the role and said he hoped Warren was an “Agile guru”. Warren had experience of ‘Agile’ but now felt under pressure to rapidly upskill. Warren spent evenings in the hotel reading up so that he could meet the client’s expectations by presenting himself as an “Agile Guru”, fearing his role and his reputation with the consultancy was at stake:

“You are right under the microscope (with the client), aren’t you? Deliver or you are gone and what impact would that have?” (Warren, Manager, Protect)

Protect consultants, working on a central government project, felt there was a cultural mismatch between the client and the consultancy because of what they perceived as everything having to be said nicely in diplomatic language. Rena was used to clients who in her view “just say it as it is” and realised that she must adapt to the client’s communication style:

I think and there is a lot more things said nicely even when they are not happy, which is sometimes dangerous because you don’t realise, they are not happy. So, it is adapting to a different style as well (Rena, Senior Consultant, Protect)

Sometimes management consultants made choices not to adapt to client pressures or expectations because they saw this as jeopardising the success of the client engagement.
Keira struggled with the hierarchical culture of the central government client and having to wait for several layers of client management to make decisions. Keira sensed that she caused a certain amount of unease when she went directly to the senior client:

...I said okay well I will just give whoever it is a call and they looked at me absolutely horrified and said “are you okay calling him?” and I said “well am I allowed to call him?” and they said “well you can, but are you sure you don’t want me to ask my boss to ask his boss to ask him?” (Keira, Senior Consultant, Protect)

4.3.2 Experiences of working with professional distance

Whilst aiming to build a collaborative, trusting relationship with the client, consultants felt the need work with professional distance and clear boundaries described as being like mesh, flexible but nevertheless present. Kylie felt that whereas it was important to have a strong supportive relationship with the client, it was also important to set boundaries:

...the relationship with the client is like mesh and the most important thing is for each of us to have our own clear sense of boundaries (Kylie, Senior Consultant, Perform)

Simon also believed that the short-term nature of consulting work meant that the client consultant relationship was not a place for deep friendships. Simon likened being a consultant to a diplomat where you spend time here and there and you and everyone else knows you will be gone at some point:
management consulting is just another example of that. Do you really
become intricately embedded if people know you might be out of the door in
a few months’ time? (Simon, Manager, Perform)

In contrast, as a newly promoted Director responsible for business development, Nigel is keen to build a lasting relationship with the client to keep open the possibility of future engagements:

it’s not only about maintaining relationships with the people you’re working
with but the people you have worked with and potentially people who could
be future clients as well (Nigel, Director, Perform)

James experienced a very positive relationship with a senior public services client. James was brought in for his specific skillset and the seniority gap was greater than he would usually be faced with. James felt that the relationship with the senior client had been earned because of value of work produced. Nevertheless, he felt he should respect the client boundaries in public services hierarchy and address clients appropriately. However, the senior client preferred to communicate with him by text. James felt uncomfortable with what he perceived as the casualness of relationship with a senior client, but liked the access:

she does text me quite a lot because you know it is easier to write a text than
an email, but it works, and it means that I am able to do my job more easily
and you know she just comes on the floor and bee lines for me but I think
she was recognising that there was immense value because I was doing
multiple roles for her (James, Senior Consultant, Perform)
Maintaining what he perceived as professional distance was a dilemma for James. He perceived that the senior client broke hierarchical rules. At the same time James felt that the value of his work meant that he deserved the improved access.

4.4 **Experiences of seeking to build a collaborative relationship with the client**

In this major theme I explore the experiences of management consultants when building what they hope will be a collaborative relationship with the client based on mutual trust, and their experiences when this was problematic. Management consultants from Protect were working on a large central government project comprising multiple sub-projects and were often working alongside or even managing or being managed by other suppliers. I explore the experiences of management consultants coping with often complex client relationships, fraught with vested interests.

4.4.1 **Experiences of building client trust**

Consultants perceived that by demonstrating knowledge and impressing the client early on in the engagement, they could establish a strong collaborative relationship with the client where the client would feel able to rely on them and trust them to deliver. The importance of building a trusting relationship with the client was mentioned by several participants:

*I’ve very quickly done a piece of work for them that will give them confidence and start to trust me, that I know what I’m doing. The task could be a few days or a few weeks but ...then you start to earn your stripes*

*(Simon, Manager, Perform)*

149
Neville experienced an attempt to impress the client that did not go well. The solution involved new technology which was new even to the expert on Neville’s team. Neville’s perception was that the client lost confidence in his team because they were not asking the right questions:

*The client expected valid advice very quickly... some of their people were a bit frustrated that they were being questions like A, B and C rather than questions D E and F, the questions they were expecting to answer (Neville, Manager, Perform)*

Consultants aspired to become what they perceived as their primary client’s trusted advisor where the client trusted them to do anything that was necessary to achieve successful delivery, even when the client knew that some aspects were not strictly within the consultant’s skillset:

*...he would trust me to do anything, and he really didn’t have to get involved. I feel the collaboration just works because you are in that trusted advisor space...especially when that sentence comes up “I know this isn’t your skillset but just fix it” whatever it may be... so nine times out of ten you can fix it because as a consultant you have to be adaptable, you just have to think about it more (Anna, Manager, Perform)*

Jill experienced a relationship with a client where she felt she was valued as a trusted advisor and where the trust the client had in her went well beyond the terms of the client engagement:

*So, the client would say “can I ask your opinion?” ... or “I need to get this off my chest, can I talk to you about it?”... that is when you start to realise*
that your working relationship, your professional relationship, your
boundaries have crept a bit and it is not just about what you are doing to
deliver and help them in that capacity, they want you to help balance their
life and manage their worry beads and that is quite nice actually… (Jill,
Manager, Achieve)

Patrick felt that building a relationship with the client sponsor based on honesty,
reliability and trust was important, and that this started with the initial proposal and was
reinforced every day. Patrick’s perception of his relationship with his client was that he
was trusted to make things happen. In return Patrick sees part of his role as making his
client look good:

I see part of my task is to make him look good, help his career and to cover
his back so that is for him but also if I am dealing with his peers then I have
very much got to be seen as being professional and sorted out and he has
made the right decision and he has got someone that knows what they are
doing working for him (Patrick, Manager, Achieve)

Keira was conscious that whereas senior management may have made the decision to
bring consultants in, the day-to-day impact was on the people that reported into them.
Keira felt it went a long way towards building rapport when you could make them look
good in front of their boss:

and actually, it doesn’t take much to you know, have a conversation give
them a view and then in the meeting and they might storm ahead and say
well I have had a fabulous idea … and you have to sit there and bite your
tongue and say what a great idea, where has that one come from? But you
Nigel’s role as sector lead meant that he was responsible for a number of client engagements in his sector and could only spend one day each week on each at the most. However, Nigel felt that by spending more time with the client initially, demonstrating value through his contribution in meetings or producing outputs, he could build a strong relationship with the client. Nigel felt he was then able to set client expectations before slowly drawing back:

...they then trust you to deliver, they trust that you make the right contribution, they trust that you know what you’re talking about. So, When I come back at a later point ...I know what the vision was. And being one step removed is actually helpful for them because you can understand what they need from a strategic point of view (Nigel, Director, Perform)

As a Director, John was responsible for overseeing consultancy teams delivering projects for their clients and acting as an escalation point. John recalled a time when the client raised some concerns about a member of the consultancy team and was clearly not happy. John was temporarily in between the consultancy and client and chose to suspend his own judgement and remove the consultant to preserve his relationship with the client. John emphasized that there had been occasions where it was appropriate to defend his team member, but he had still made the same decision:

“It may be valid, it may not be valid, it may have some grains of truth in it. Whatever it is, you have to act quickly and decisively...If the C Suite person
says we are not getting on quite so well with X, we have got a few concerns, what they are really saying is, can you get rid of X and ninety-nine per cent of the time that is exactly what you should do (John, Director, Achieve)

4.4.2 Experiences of problematic relationships with the client

There were occasions when the client and sometimes the consultant were not invested in forming a collaborative relationship. Simon experienced a situation where he perceived he and the client were completely incompatible. Simon was there for a few months and felt that, although it was a very unhappy relationship, the engagement somehow worked out in the broader context of the team:

he was a very alpha male, northern white bloke...very different to me personality-wise...and also had a sense of humour that I just didn’t connect to at all and was quite inappropriate actually. It felt sometimes that it (the client engagement) was part of a club that I just didn’t belong to... from a cultural and interpersonal point of view, we just were chalk and cheese (Simon, Manager, Perform)

There were also occasions when the consultant failed to achieve a common understanding on the approach, scope and expected outcomes of the project with the client and the client did not engage leaving the consultant feeling marginalised in what they experienced as a toxic environment:

They (the client leads) were ignoring everyone and just making decisions...even though they had no subject matter expertise. We don’t expect to be treated as employees, but we do expect to be listened to and
Consultants found relationships with the client challenging when they perceived there was a lack of trust because the client felt threatened by change, or was suspicious of the consultant’s motives for example, when projects focused on head count reduction:

*The changes would reduce the workload of her team and she may lose some team members. She stormed out of a few meetings because unfortunately she was not handling the pressure of what we are asking of her very well.*

*(Warren, Manager, Protect)*

Keira experienced working with a very ambitious junior client who in her view saw the consultancy team as a threat to his position. The junior client made themselves indispensable by not sharing and became a bottleneck. Keira experienced tension between competition and collaboration which remained unresolved. Over time Keira and the team found ways of working round the individual concerned to facilitate progress:

*He came across as very knowledgeable, very intelligent ... but not experienced enough to realise that delegating and using a team would make him look good.* *(Keira, Senior consultant, Protect)*

Management consultants were sometimes able to work through what they perceived as a lack of trust by the client. Bernard was a subject matter expert and many of his client engagements involved reductions in head count. Bernard often experienced tension between the expected outcomes of the engagement and building a relationship based on trust with clients at operational level. However, Bernard perceived that by helping the
client by using his expertise to create business cases for things they think they need, he could win the client over and make progress:

So, getting them onboard is the challenge... the only way ...is to be completely open and honest and not try to pretend you are doing something you’re not. Trying to help them do what they need to do as well... quite often, I have ended up trying to make business cases for them for other things they think they need .., even though they are out of scope. (Bernard Manager, Achieve)

James worked with a key client known as one of the most challenging to work with in the client organisation, and who had a reputation for having people removed from the engagement:

It was like the shutters were up it is probably the strangest client relationship I had ever had it was almost like it was an inconvenience having consultants there, even though she clearly needed them (James, Senior Consultant, Perform)

James found that the client was under pressure because of a technology supplier. The client was micro-managing that aspect of the project and not the rest of the team and expecting that to work but it didn’t. James suspected that the client was probably out of her depth as this was her first experience of such a large and complex project. James found that the client did not want an interactive conversation it was very much, “let’s talk but I am going to talk at you, and you are going to listen”. However, James was eventually able to carve out a relationship with the client where he took responsibility for part of the team:
I think she started to realise that she could maybe let her grip on this area go a little bit and know that things would still work ...the relationship was borne out of mutual respect so “I know you are doing a good job” rather than having anything in common (James, Senior Consultant, Perform)

James was initially contracted for six weeks to cover the holiday period but stayed for ten months. James found the experience extremely challenging, but felt it was actually quite rewarding. James felt immense pressure at the time but missed it afterwards. James found it strange that he was still in touch with the client and not with clients where there was a more conventional relationship.

There were occasions when management consultants experienced themselves as being perceived by the client as a threat. This sometimes occurred when they perceived the client felt threatened by changes proposed or when the client wanted complete control. In both the following examples the experience occurred when management consultants were relatively inexperienced and perhaps lacked the self-confidence to push back on what they perceived as “bullying”, such was the perceived pressure to put the client first and live up to the expectations of their consultancy.

Jill felt that she was able to build strong relationships. However, early on in her career she experienced the client being very nervous about her department being selected first for change and perceived that she felt threatened. The client scrutinized everything Jill did, and she recalled feeling isolated and that her self-confidence and self-esteem were under attack in a real test of her personal resilience. Jill recalled one evening when the client would not let her leave until she had recounted every aspect of her conversation with a Team Leader:
She was ticking things off in her book and she said there was something else you asked that individual, what was it? And I was racking my brains and she said, I am going to give you one more opportunity to tell me what it was and I said honestly, I don’t know, and she said “you asked them if they were going on holiday, do not retain any information from me because I know!”

(Jill, Manager, Achieve)

Alistair experienced a client who he perceived wanted complete control rather than the partnership Alistair was expecting. Early on in his career Alistair worked with a client programme manager who he perceived had procured the wrong product and was trying to make it do something it wasn’t designed to do. Alistair experienced the programme manager as creating a situation where Alistair and his team would take the blame for all the issues that occurred during implementation:

…it was horrific…the client (programme manager) was just using us as a battering ram to try and get some stuff done…We were supposed to be in a partnership, but it was “you are the supplier you will do what I tell you”.

Whenever I spoke to the business it was always quite pleasant, but we had to go through him … It was very antagonistic. He was always looking for a fight because he always thought that he knew better … Even with his own team, he would wait for people to be on holiday to then make decisions and move people around like chess pieces on a board to try and get the outcome he wanted. (Alistair, Director, Protect)

Alistair experienced himself as needing to protect his team by keeping the politics and the continual fights away from them whilst resisting what he perceived as pressure from the programme manager to cover up the severity of the problem. Alistair insisted instead
on accurate reporting perceiving this as a way to make the problems more visible to the broader client organisation. Eventually the programme manager had Alistair removed from the project, perhaps believing that he could no longer control the situation.

Alistair and Jill were eventually able to come to terms with what he perceived as “bullying” by the client by believing that it was never personal, and their respective clients were experiencing their own pressures. However, the destructive nature of the episodes and the anxiety, frustration and anger they experienced meant that it was several years before these management consultants were able to reflect on their experiences dispassionately.

4.4.3 Experiences of coping with multi-supplier relationships with the client

Management consultants sometimes worked alongside contractors and other consultancies on client site and were sometimes dependent on them for successful delivery. Warren managed a team of seven client-side, a mixture of Protect consultants, client staff and independent contractors. The client sponsor used to be a consultant and was now an independent contractor working for the client. Warren appreciated working for someone who understood consultancy and knew what to expect although he felt the sponsor’s contractor status added further complexity because the client still had the final say. A further complexity was that Warren and his team were working alongside a major software supplier and another consultancy team as well as other independent contractors. For Warren this felt like quite an ambiguous environment where there were shared responsibilities and people had vested interests in different parts of what he and his team were trying to do. The client wanted consensus and to move things forward and Warren worked hard to bring everyone together:
It is a real medley and we have all just had to all come together and work for the client. We have to do the right thing you can’t be precious about …well you don’t want to expose yourself too much. But we have actually broken those barriers down …. (Warren, Manager, Protect)

Warren felt a sense of pride that the client had congratulated the consultancy on the way in which they had managed a complex situation that could have been a political minefield.

In contrast, Rena felt the standards for some suppliers and contractors were not as stringent as the ones she worked to with Protect. Rena had a dual role of client and supplier. Her perception was the differences she experienced in the standards and work ethics of some contractors her team were responsible for undermined forming a positive collaborative relationship:

There is a different expectation of the quality of work we are trying to achieve...and a lot of them you know, they are just there because they know the project manager, they just stay there and get paid and not do that much along the way (Rena, Senior Consultant, Protect)

Horatio also had a dual role of client and supplier and was conscious of the need to be commercially assertive when he found himself between suppliers and the client:

...The problem with having to engage directly with the suppliers is that we don’t have contracts with the suppliers we have contracts with the client... we normally just do what the customer asks but if that means dropping something else we just make sure that the client knows what we might need to drop as part of our already contracted scope... (Horatio, Senior Manager, Protect)
Participants had experienced poor team management and the poor performance of individuals within client teams which they saw as a major barrier to forming a collaborative relationship with the client. Amy experienced working with a contractor who had been brought in by the client to manage the team but was not up to the job:

...he was supposed to be over-qualified for what he came in to do it felt like he should have known everything and probably should have told us how things worked ...it didn’t really happen we ended up having to support him... it was a case of trying to help him figure out what he needed to do next and, even though he was a micro-manager, he wasn’t managing what I was doing because he had no idea (Amy, Senior consultant, Protect)

From Amy’s perspective she took time to try to help the contractor but his lack of understanding of what was required meant that progress stalled, and a collaborative relationship was not possible. The client eventually dismissed the contractor.

For management consultants in Achieve and Perform the complexities of coping with multi supplier relationships had a more internal consultancy focus. Achieve and Perform operated an Associate model where they supplemented consultancy resources on client engagements with known and experienced independent contractors. The perception of less experienced consultants was that Associates had their own agenda and this did not include providing the level of support they would usually expect from consultancy colleagues. Lennie worked with an Associate on his first project and felt unsupported:

I found it quite difficult ... he wasn't really minded to give me any development assistance or clerical help or any support beyond delivery...he would call me at 8pm, 9pm telling me to do stuff. I don't think he had the
Perform hat on of welfare and things like that...I would be up until all hours trying to get work done (Lennie, Consultant, Perform)

In contrast some more experienced consultants preferred to work with Associates. Patrick felt that he could quickly develop mutual trust within the team and get far more done with what he perceived as a team of experienced, like-minded individuals:

It’s too easy in some cases, when you have people who are similarly like-minded... more experienced people who have been Senior Managers. If you resource a programme with people from that background, then it is much easier to pull it all together and get mutual trust and share the workload...

(Patrick, Manager, Achieve)

4.5 Chapter conclusion

When engaging with the client and the client organisation management consultants experienced a range of emotions. They perceived they were in a weak position of not knowing and experienced pressure to rapidly understand the client and the client organization, so they were able to demonstrate credibility and value. Experienced management consultants became skilled at coping with ambiguity and making inputs without knowing how everything worked. The time bound nature of some client engagements caused management consultants to experience feelings of stress when they perceived the client’s perception of the approach, scope and expected outcomes was different from their own, or they perceived scope was vague or not adequately controlled or appropriately resourced.

Management consultants perceived that the consultant label and outsider status meant that they automatically had some credibility and that clients were often too immersed and
unable to see the problems. Some perceived their outsider perspective would be undermined on long-term client engagements as they became more immersed. Management consultants perceived some clients were unreceptive to outsider expertise, either because it differed from their own views and a compromise was required to make progress, or the client considered themselves to be experts, in which case the consultant perceived they must consider their own role.

Management consultants adapted their image, ways of working and communicating to meet what they perceived as the expectations and preferences of the client. Although they resisted pressure to adapt when they felt this would jeopardise progress. They also sought to minimise differences in lifestyle that they felt would set them apart from their key client and make progress more difficult. Whilst aiming to develop a collaborative relationship with the client some preferred to maintain what they perceived as professional distance, avoiding close ties in a relationship they regarded as temporary. More senior management consultants actively sought close ties with clients they perceived as a source of future business.

Management consultants aspired to become the client’s trusted advisor where the client trusted them to do whatever was necessary to ensure successful delivery even when it was beyond their usual skillset. This relationship between client and consultant, built on trust, honesty, reliability and making the client look good, sometimes extended to the client valuing input from the consultant on matters that were beyond the terms of the formal engagement. Directors perceived that once trust was established their role of trusted advisor could be sustained even though they were not involved in day-to-day delivery. They were prepared to suspend their own judgement to meet client requests to remove team members if necessary, to preserve the relationship.
There were times when management consultants found forming a collaborative relationship with the client challenging. This occurred when client and consultant were not invested in forming a collaborative relationship because of a perceived clash of personalities. There were also occasions when the consultant perceived the client felt threatened by the proposed change or did not agree with the approach, scope and expected outcomes of the engagement. Management consultants sometimes felt bullied by the client in what they experienced as a destructive relationship where they perceived the client had their own pressures and motivations for wanting to be in control.

Protect consultants worked alongside other consultancies and contractors on client site and perceived that they must be receptive to ways of working together that resulted in successful delivery for the client. They perceived the poor performance of some contractors as a barrier to forming a collaborative relationship. Perform and Achieve operated an Associate model where experienced independent contractors were used to supplement consultancy resources as required. More junior consultants experienced difficulty in gaining the support they needed from what they perceived as people who did not share the values of the consultancy. In contrast, experienced consultants welcomed working with what they perceived as like-minded individuals who required little supervision.
5 Navigating between the demands of client and consultancy

5.1 Chapter introduction

In this chapter I outline the findings for the second of three superordinate themes which concerns the experiences of management consultants navigating between the often-competing demands of their client-facing and consultancy-facing systems of engagement. I first present data on how management consultants experience and manage the tension that often exists between client-facing and consultancy-facing priorities. I then present data on management consultants’ experiences of coping with the performance and career development expectations of their consultancy and the pressure they experience to be visible within their consultancy whilst meeting their utilisation and development targets to ensure they are not overlooked when they are away on client engagements. Finally, I present data on management consultants feeling a sense of belonging to a range of different liminal consultancy communities. Some management consultants referred to their consultancy as “the mothership” in the context of belonging and maintaining perspective as a management consultant. That sense of belonging was more complex than simply belonging to the consultancy organisation or the client organisation, and there were times when they experienced feeling detached from and even abandoned by formal and informal structures.

The structure of the chapter follows the emerging themes from the analysis outlined in Chapter 3 Methodology and is shown in Figure 5-1 below:
Figure 5-1: Themes in Navigating between the demands of client and consultancy

5.2 Experiencing and managing the tension between client-facing and consultancy-facing priorities

In this major theme I first present data on the nature of the competing client-facing and consultancy-facing priorities experienced by management consultants. I then present data on management consultants’ experiences of coping with and managing competing client-facing and consultancy-facing priorities. Finally, I present data on the guilt some consultants experience when engaging with internal consultancy work on client site.

5.2.1 The nature of competing consultancy-facing and client-facing priorities

The research demonstrates the extent of the consultancy-facing role of the management consultant. Whereas some tasks were completed by those “on the bench” that is, between client engagements, the experience of management consultants was that many consultancy-facing tasks and responsibilities were ongoing and must be performed
alongside client work, sometimes on client site. Manager grades and above from all consultancy settings were expected to contribute to the operation and ongoing success of their consultancy. This might include responsibility for the career management and development of more junior colleagues, leading an internal capability or sector team or being a subject matter expert for a specialist area. Even when consultancies were prepared to compromise billing to allow management consultants to undertake consultancy-facing work, management consultants sometimes found it difficult to separate themselves from a demanding client engagement. The tension between client and consultancy priorities was heightened for management consultants below manager grade from Perform and Protect who were expected to make an internal contribution as part of their performance and career development objectives even though they had far less control over their time than their more senior colleagues. In contrast, making an internal contribution was not expected for Achieve consultants below Manager grade even though many did so as a means of networking and gaining skills. The tension between the needs of the client and the consultancy extended beyond tasks to commercial priorities.

**Bench work**

Some consultancy-facing work was performed by management consultants who were on the bench. However, Directors in all consultancy settings found this problematic as consultants were often unable to see the task through and that meant having to spend more time bringing people up to speed. John felt that perhaps more pressure should be put on consultants to complete the task alongside their client engagement:

...gave it to her on Monday she is on the bench, she got a gig on Tuesday and she is now on to a full-time project on Wednesday... my expectation is that she should still do that work but this is where I think we are very
accommodating...maybe other firms would push a bit harder and would expect that consultant to work much later for the rest of the week to get that to me (John, Director, Achieve)

Ongoing internal work

Whereas some internal work was completed by management consultants on the bench, the data indicate that much of the consultancy-facing work undertaken by management consultants was ongoing and could not be confined to bench time. More Senior Managers from all consultancy settings were responsible for the career management and development of more junior consultants. Protect and Perform were prepared to compromise billing by allowing Career Managers to book one hour each month for each career managee to a separate code, reflecting the importance the consultancies placed on this activity, However, Warren experienced tension between client and consultancy priorities when he found that taking time out from a busy project was sometimes problematic:

...even if Protect is saying I am okay to let you take some time out and do it (Career Management) you can’t really sell that to the client. So, it all becomes this amazing juggling act to make sure you are hitting your deliverables, but at the same time not ignoring your responsibilities and the people... you want to see them grow and progress in the company (Warren, Manager, Protect)

Other ongoing consultancy-facing work was not funded in terms of separate codes to book time to. Senior Managers in all consultancy settings experienced having to manage internal leadership responsibilities alongside their client work even though the client’s
expectation was that they would be available for client work forty hours each week. Leadership responsibilities could involve leading a sector or capability team or being a subject matter expert. Horatio was People and Skills lead for his Practice with responsibility for developing training, communication and engagement. Horatio experienced tension between the demands of his Practice leadership role and the expectations of his client and was relieved that having formed an internal team he was now able to delegate some of the responsibilities. Nevertheless, although the workload was now spread, all of the consultants now running the delegated workstreams also did so alongside their forty hours of client work:

…”all of that is unfunded in terms of codes to book to. So, you do your forty
hours minimum on client site and the internal work is expected to be in the
margins. Initially I had to pick up a lot of that myself ... now I have at least
one person running each of those work streams for me which means that
fortunately I don’t have to do it all myself anymore. (Horatio, Senior
Manager, Protect)

Geoff was passionate about leading his capability team but like Horatio, everything he
and his like-minded volunteers did was achieved in the margins of client work or their
own time. The tension Geoff perceived was not only between the client and consultancy,
but also between the immediate needs of the consultancy to maximise billing and their
longer term need to develop propositions to gain new business:

I don’t have any budget to do anything ... I can shape the approaches that
we use, develop propositions and process and templates put together
training courses... this area is stuff I absolutely love...We are very much
focused on fees so you do have to see what you can do in the margins ....it is
a model that relies on people having almost like a hobby that they just really enjoy. (Geoff, Senior Manager, Protect)

Management consultants’ perceptions were that decisions between competing client-facing and consultancy-facing priorities were rarely straightforward. Bernard was a subject matter expert and had developed methods and training in his specialism and acted as a sounding board for colleagues alongside his client work. Whereas Bernard’s view was the client always came first, he was often called on for help by colleagues who also had clients:

*I think there is always a priority, and it is always the client first. So, everything bends to fit around that...but if another consultant is struggling to figure out how to do something there is usually a client at the end of that and otherwise, we could lose them.* (Manager, Achieve)

**Internal contribution**

Manager grades and above from all consultancy settings were expected to take on internal roles and responsibilities and contribute to the operation and ongoing success of their consultancy. More junior grades in Perform and Protect were also expected to make an internal contribution. This formed part of their performance objectives and was a pre-requisite for promotion. They also experienced internal work as an opportunity to gain skills and elevate their profile within the consultancy. This meant that they often had to perform consultancy-facing work alongside their client work even though they had far less control over their time than their more senior colleagues:

*So, with the client they are very much, if you are on client site you are one hundred per cent on client site and you should not to anything for...*
Protect…but, for our own personal progression we have to do something

(Amy, Senior Consultant, Protect)

In contrast, making an internal contribution was not expected for Achieve consultants below Manager grade. Many did engage in internal work experiencing it as a means of networking and gaining skills. However, some pushed back because of lack of recognition attached to internal work compared with meeting or exceeding expectations on client work:

That’s probably one of the reasons I would step back …and consider how much time am I giving, because I think solid delivery day to day makes more difference (June, Senior Consultant, Achieve)

Conflicting client and consultancy interests

Competing priorities also extended to potential conflicts of interests. When contract signing was held up because of bureaucracy, Horatio experienced being between the demands of his client who he trusted and for whom he wanted to work at risk with no contract in place rather than standing teams down and delaying the work, and consultancy stakeholders who did not want to take the risk:

one of the hardest things is when your internal stakeholders and your external stakeholders don’t want the same things and an example of that is kind of working at risk where the customer is saying just get on with it and you think perhaps that is right but the internal stakeholders are saying, nip it in the bud I don’t want the risk, and being sat in the middle is often quite difficult (Horatio, Senior Manager, Protect)
5.2.2 Experiences of managing competing client-facing and consultancy-facing priorities

I present data on the ways in which management consultants experienced coping with the competing demands of their client and consultancy systems. There were times when management consultants experienced having to manage significant or urgent tasks alongside their client work. They coped by separating mentally and sometimes physically from their client work, using spaces away from the client or the interstices of the day to perform internal work. Some preferred to compartmentalise client and consultancy work, choosing to perform internal work in the evenings at home in their own time or on Fridays when many consultants were able to work from home or the base office of their consultancy.

Physical and mental separation

James took on what he felt was the huge responsibility of getting his consultancy through an International Standards Organisation (ISO) 9001 audit. James felt under extreme pressure, passing the audit was a pre-requisite for the consultancy being able to bid for work in the public sector. James found balancing the pressure and importance of his internal commitments with the demands of his client work very challenging. James coped by going to work early to get his client work done and then moving physical location on client site and using his consultancy laptop to create a completely different environment. James felt that he could then achieve physical separation from his client work environment and transition to the right mindset for his internal work:

* moving physical location so not sitting at my desk where I had been working through client stuff for the past seven hours ... just getting up and going*
right, I am going to move desks or I am going to go and sit in the meeting room, where I can physically delineate between that work and something else. I am still on site it is not like I have suddenly disappeared, people can still see me, but just having that different physical working location I think does a lot for how your brain is able to compartmentalise stuff (James, Senior Consultant, Perform)

Neville was asked to work on complex aspects of an urgent bid alongside his demanding, time pressured client engagement. Neville felt able to isolate himself mentally on client site without changing his physical work environment:

...maybe it is just one of my natural traits. If I make a decision about what I am focusing on, then I can isolate myself from things that I don’t need to focus on. Even while physically I may be in the same place. (Neville, Manager, Perform)

Jill often had to join internal calls or meetings during the day, on client site. When this happened, she used transitioning between meeting rooms to transition mentally between client and consultancy systems on the move:

... I went downstairs to a separate meeting room to join the call because I am working in a room with members of the team and the client team...As a consultant your brain has to work at a million miles an hour and you have to get used to switching your thoughts. The pathway from meeting room “A” to meeting room “B” is the distance you have to get your mind into the right frame (Jill, Manager, Achieve)
Consultants reported that accommodating less complex tasks such as checking consultancy e-mails or answering simple queries was much easier. They experienced being able handle this more spontaneously as they became used to switching their focus between client and consultancy systems:

*I have never really found it difficult to switch between I think it is just something that you automatically grow into ... I am sure I probably found it a lot more difficult when I first started, being five years in, it just seems natural now* (Amy, Senior Consultant, Protect).

**Experiences of using different times of the day or week**

Some consultants experienced coping by using different times of the day or week. Many management consultants were able to work from home or base office on Fridays. Keira used this time away from the client to engage in consultancy-facing tasks:

*I try and have an allocated time, generally on Friday’s. And I think most people tend to do this because generally we are on client site from Monday to Thursday and then most people are back at the base office or work from home on Friday* (Keira, Senior consultant, Protect)

Rula managed a sector team and organised meetings at the interstices of the day so as not to conflict with client time:

*It eats into your personal time essentially. It’s the nature of it Typically 8:00am to 09:00am or 6:00pm to 7:00pm. If you’re out of town, you’d dial in. And if you can, and you are in London, you’d probably go in person.*
Occasionally sector teams will do things in working hours, but people generally try and avoid it. (Rula, Manager, Perform)

Some management consultants managed competing client-facing and consultancy-facing demands by electing not to do any internal work during the day. Anna chose instead to do internal work in the evenings or at the weekends:

*I feel that if I am on client site and I am being billed on client site I should be doing client work... I don’t do internal work during client hours* (Anna, Manager, Perform)

Despite the pressure of internal responsibilities, the priority was to maximise billing and meet the needs of the client and there were times when management consultants had to push back on internal work. Some went further and questioned the value and priority of some internal contributions, describing them as shelf ware. Managers felt they had more control and more opportunity to achieve synergy between client-facing and consultancy-facing work. Experienced Directors perceived a more holistic view and did not distinguish between client and consultancy systems.

**Pushing back**

Management consultants experienced sometimes having to say no to performing internal work alongside their client work. Even in Achieve where internal contribution from consultancy grades below Manager was not expected, management consultants found if they had specific skills that were not available amongst consultants on the bench, they were called on to perform tasks, alongside their client work. Jack had skills that were in demand to improve internal systems for his consultancy, potentially saving colleagues many hours on administration. Jack’s experience was that he was regularly called on by
Directors to help, and it was not always possible. When this occurred, Jack experienced tension between the needs of his client engagement and his consultancy but also the tension between wanting to be seen as a team player and the limits of the workload pressure he felt able to cope with:

I was on a time-intensive project and I just had to push back and say, “look I am really sorry”. Usually it is better when I can give a view of when I can do something. Or, if it’s something that must be done now, I can say well, I can take it this far but that’s as far as I can go at the moment... you want to be seen as someone who is on-side and a team player and does stuff for the wider business (Jack, Senior Consultant, Achieve)

Directors in Perform perceived they had given a clear steer to consultants to do one thing for their internal contribution and do it well. However, Nigel’s perception was that consultants still struggled to prioritise and were sometimes slow to push back. Nigel felt this could have a worse impact on performance than failing to make an internal contribution:

if your client work becomes so demanding then you should probably try and drop all the other stuff...I have seen people go wrong on that, focusing too much on the internal work. This is our bread and butter (client work), if you don’t get this right, there is no point in having a conversation about internal contribution (Nigel, Director, Perform)

Sam experienced tension between a demanding project and having to make an internal contribution and questioned the value and priority of some internal work:
...the consultancy needs to think strategically about what is important around that, and what are the things that frankly just produce shelf-ware, and it looks good in a performance review that you have done an activity, but it has not actually added any value (Sam, Manager, Protect)

**Perceiving synergy between client and consultancy work**

Managers and Directors from all consultancy settings were involved to some extent in internal sector or capability leadership roles. Simon’s experience was that this made it easier to achieve synergy between the knowledge development needs of the sector and what he was delivering for the client:

it is so much harder to deliver one thing in the day and another at night. As you become more senior you look at those things more holistically... and the dualism is diminished in a positive way. (Simon, Manager, Perform)

Directors did not always distinguish between client and consultancy work. They were far more focused on business development and perceived skills development and proposition development as enabling new business:

So, we don’t sit in a room thinking up a solution. We do it with the client. It’s part of the work that we’ll invoice the client for because it’s part of our deliverables. We test new things, then it becomes packaged at the end of the project... It’s shared IP so we can use it as well (Harvey, Director, Achieve)

**5.2.3 Experiencing guilt when engaging in consultancy systems on client site.**

Consultants generally completed internal work away from the gaze and earshot of the client. They were keen to say that this was from a professional perspective or out of
respect for the client. However, the data indicate that some consultants experienced guilt when engaging in internal work on client site, even though they were often working well beyond their contracted hours. Management consultants felt comfortable with doing internal work on Fridays when they were working at home or base office even though they were still billing their time to the client. This suggests that the guilt they experienced was more related to the feeling of being a guest on client site and the risk of a negative reaction from the client.

**Professionalism and respect**

Nigel felt that it was important from a professional perspective that internal calls and conversations on client site were discrete and certainly not within close proximity of the client:

… it’s about not making it obvious to your client…I wouldn’t dream of talking to colleagues about internal stuff in front of the client, you just don’t.

If I heard someone on our team do it, and I know they wouldn’t, I’d tell them don’t do that, that’s not cool. I think limiting that kind of conversation is a good strategy. (Nigel, Director, Perform)

June experienced times when she was able to accommodate internal work during the day and chose to do this out of site of the client or on Fridays. She was keen to point out that moving to a different area on client site was not necessarily to hide what she was doing from the client, but out of respect:

I’ll book a room on the client’s site so it’s not in someone’s face that I’m working on a slide deck that’s not their brand…out of respect really. I absolutely have been the person to say, no, I can’t do that right now but
let’s do it on Friday, and that’s sort of where Friday is still client work, but

Friday is the day that a lot of stuff gets moved to if I’m not on-site that day

(June, Senior Consultant, Achieve)

**Feeling justified**

Kylie felt fine with doing internal work during the day, she felt justified because consultants work more than just nine to five:

> So, some internal work might be done during the business day. But then that day that you stayed at your clients’ office until seven thirty or eight makes up for those lost hours...having looked around the office I would say there's minimally probably an extra ten hours of work being done in and around the workday, and maybe a bit on the weekend (Kylie, Senior Consultant, Perform)

**Experiencing guilt**

In contrast, Horatio found the pressure of being on a day rate made him feel uncomfortable about spending what he considered to be the client’s time on internal consultancy-facing work. At the same time, doing internal work at the end of the day meant that Horatio experienced tension between work and personal time:

> For me I think the challenges are finding the time to get the internal work done and spending an hour on the ‘phone talking about something that is completely non-client related when you are on a day rate then they are going to wonder why they are paying you. It is getting that balance as well
against waiting until the end of the day to get started on job number two.

(Horatio, Senior Manager, Protect)

Consultants experienced guilt even when time for internal tasks for example, career management, was built into the contract with the client. Even though Perform included time for Career Managers to talk to their managees in client engagement contracts, Simon experienced guilt when doing internal work on client site and elected instead to talk to his managees at the end of the day:

_I don’t know why, but somehow 5:00pm in my mind, psychologically, it gives me peace of mind that I’m not doing stuff on a client clock. You might spend some time doing internal stuff during the day when you’re actually billing hours to your client. I’ve only ever been able to do a little bit of that and then at some point I just start feeling really guilty._ (Simon, Manager, Perform)

The Central Government client had banned the use of Protect laptops on client site. Amy’s perception was that this may have been because consultants tended to look guilty if the client approached when they were logged on:

_I think their worry was that… somebody has been working on Protect work, and they might have only been on it for five minutes or it could have been an hour, but because they have walked past they (consultants) have shut it down and just pretended that they weren’t doing anything wrong, and it was as if they were doing something wrong and I think that is where the mentality came from._ (Amy, Senior Consultant, Protect)
5.3 Experiences of coping with consultancy performance and career development expectations

In this major theme I first present data on the ways in which management consultants experience themselves as remaining visible within their consultancy system to ensure they were not overlooked for the best roles or career development opportunities. I then present data on the pressure they experienced to maximise their utilisation on client engagements and develop skills. Finally, I present data on management consultants’ experiences of coping with career progression.

Management consultants from all settings reported that senior management were very accessible in their consultancy. However, their perception was that management structures were highly complex where they might be reporting to several different managers at the same time. This could include their Career Manager responsible for performance management and development, Project Manager responsible for leading their client engagement, Practice Manager responsible for their capability team within the consultancy, and managers leading any internal work they were involved in. Management consultants might also be a member of a Sector Team and there might also be an Account Manager with overall responsibility for the client engagement. In the absence of conventional line management, consultants from all consultancy settings perceived potential flaws in the performance appraisal process where senior people in the consultancy periodically discussed performance and ranked consultants against each other, behind closed doors. Management consultants experienced the need to have a presence and be visible within their consultancy even though they spent most of their time away on client engagements.
5.3.1 Experiencing pressure to be visible

Management consultants perceived career management and development as a largely self-managed activity. As a result, they experienced pressure to be visible to senior people within their consultancy to ensure they were selected for projects that would enable them to develop skills and prepare for career progression whilst at the same time achieving their utilisation target. Management consultants in Protect and Perform used internal networks and internal contribution to be visible to senior internal stakeholders and avoid being overlooked when it came to performance appraisals and promotion. They perceived the performance appraisal process was open to exploitation, some regarded it as a game. In contrast, the perception of management consultants in Achieve was that the route to gaining support for development and career progression was aligning with a powerful patron and consistently doing good work for them. They perceived that in return their patron would recognise their external achievements, ensure they were fully utilised and that they developed the skills they needed.

Experiences of leveraging internal networks and internal contribution

As a Director, Nigel now spends more time at base office but remembers earlier in his career he found it a challenge to stay visible, especially when he was working away from home:

*If you are on client site Monday to Thursday, then you have to go back in the office on a Friday just to be seen to be around and that you’re still alive and still working on things.* (Nigel. Director, Perform)
Simon experienced increased visibility with Partners when his internal development related to third sector was incorporated into the broader public sector team and he gained the sponsorship of a Director:

_It meant I had a senior Perform person directly overseeing my work who was supporting me and opening doors within the firm That was incredibly useful because it just meant that suddenly I was on the map in a way that I wasn’t before that_ (Simon, Manager, Perform)

Keira had secured a practice role which involved running forums and had leveraged this to raise her profile and to secure new roles:

_It is a really good way to have an awareness of what is going on around the business and what other people are doing and what other very senior people are doing as well and the different projects they are leading. And I have this take a way that there is an aspect of luck going from role to role to role, but I have also been quite proactive about finding new roles because I have had that opportunity to from an internal perspective_ (Keira, Senior consultant, Protect)

In contrast, for management consultants in Achieve, the route to gaining support for development, career progression and meeting utilisation targets was alignment with a powerful patron. Bernard felt that whereas Senior Consultants in Achieve might raise their profile by getting involved in internal work it was unlikely to help with performance appraisal or career progression. Bernard’s perception was that seeking patronage by aligning with the right Manager or Director and consistently doing good work for them was more effective:
We were a small business and I think that is one of the small business legacies we still have. You need somebody very senior who really knows you and can speak up for you in the periodic meetings that we have where we talk about everybody... It is very subjective (Bernard, Manager, Achieve)

**Experiencing the performance appraisal process**

Management consultants from all consultancy settings below Manager grade were more dependent on their Career Manager to speak up for them in senior circles. Jack feels quite fortunate to have a Director as a Career Manager as this gives him visibility within the consultancy’s Leadership Team:

*Mine is one of the Directors so I was quite fortunate with that. ...My first two-and-a-bit years in the business I was managed by a Principal Consultant and bluntly, I felt that put me at a real disadvantage over some of my peers because I wasn’t being talked about... I did not have an advocate in those senior management forums. I don’t think that you can get promoted really unless you have got a Manager or Director in your corner* (Jack, Senior Consultant, Achieve)

Rula perceived more senior people speaking up for a consultant during the periodic performance discussions could be incorrectly interpreted as that consultant making a more valuable contribution:

*if you are doing lots of internal work, because you’re touching more people, you have more people to speak up for you in the room.... even if you’ve been absolutely smashing it on your client’s side and you’ve done one bit of internal work, if two people are saying oh that person’s excellent*
versus five people saying another person’s excellent, it feels like it’s a more valuable contribution even though it’s just more people saying your name... It’s not really reflective of the size of your contribution... or how hard you’ve worked (Rula, Manager, Perform)

Sam felt that a downside of the competency-based appraisal and promotion process in Protect was that it was easy to demonstrate competence without having much experience and get promoted before they are ready:

you see people who get promoted too quickly. They find themselves, probably at the grade I am now, without really having any experience in anything. They have kind of just jumped through a load of hoops to get there, and looked really good... and they end up a bit trapped I guess, because they are kind of at a level it would be hard to justify elsewhere (Sam, Manager, Protect)

Geoff saw the appraisal and promotion process as a bit of a game where people went out of their way to get on the radar of those who make decisions on promotion and hold the purse strings:

so people are fighting for her (Head of consulting) practice roles just so they can be around her and she will know what they have done and you know she holds the purse strings for who gets promoted and she does the scoring and moderation at the end of the appraisal round. So, whilst you have got all the Career Managers there, she could change that number (Geoff, Senior Manager, Protect)
5.3.2 Experiencing pressure to be utilised and develop skills

Experiencing pressure to be utilised

All management consultancy settings reported fragile margins. As head of consulting for a sector at Protect, Alistair was also responsible for the commercial success of his team and felt acutely aware that the days of high fees and sizeable margins were long gone, and the success of his team depended on high utilisation. Even as a Director with overall responsibility for a team of over two hundred consultants, Alistair was expected to be utilised on billable work for twenty per cent of his time. Alistair compared the margins in consulting to those of low-cost airlines:

... whilst consultancies might report having target margins of sixty per cent, actually when you start looking at the return on sale it drops to below ten per cent. And that is a tight margin in business, a bit like low cost airlines

(Alistair, Director, Protect)

Management consultants from all consultancy settings reported feeling under pressure to secure their next client engagement to achieve their utilisation targets and develop skills. They perceived that there was an internal job market where more junior consultants had little control and ran the risk of being stuck in a role that would not provide skills development or even stuck in a sort of limbo, between roles, on the bench. The perception of management consultants was that when Directors and Managers were putting delivery teams together, they chose people they knew who had worked well for them in the past. The pressure was heightened in Achieve where there was more emphasis on sponsorship by senior people. This placed additional pressure on Achieve consultants to perform well so they were selected next time. Alice encountered difficulty on her recent project and
was concerned that it would adversely affect securing future roles in that sector if people perceived that the failure to deliver was her fault:

*everyone knows the reasons why and it was not personally my fault. I am hoping that other people in Achieve aren’t going to look at it as personally my fault... hopefully people will understand it wasn’t all up to me it was the situation...there were lots of things involved* (Alice, Senior Consultant, Achieve)

Walter’s perception was that it was better not to be too picky or too high maintenance, and this would increase his chances of being selected for roles:

*...if you're good, if you've proven yourself in different areas, you're not very picky, low maintenance, hygiene factors are all ticked off. You know, do your expenses on time, even small things like that... senior people will be more happy to pick you straight away if they hear that you're available* (Walter, Senior Consultant, Achieve)

John agreed that he was very guilty of sticking to the same people for his projects. His perception was that Directors and Managers in Achieve all had their “A Team” and that a few core consultants would have been on all of their projects:

*I know I am guilty of it but it doesn’t necessarily mean I would change it...generally you have two motives: you want to use people that you know but also you want to keep people that you know well utilised. So, you will look for them and I know X is a good guy, I know what he can do and I will shape the role to fit X a little bit and then we are off and running again* (John, Director, Achieve)
Management consultants who were between client engagements were deemed to be “on the bench”. Consultants recalled experiencing feelings of uncertainty and instability when they were on the bench. These experiences were acute for graduate entrants in Protect who, having got a job now found that they seemed to not have a job:

*it is a very odd concept especially for young early career graduate joiners, me included…. You apply for a job, you finally get a job, and then you seem to arrive and not have a job...and it might be a month or so before there is a role somewhere that needs you. And even then, you don’t quite know what you are going to be doing until you get there* (Keira, Graduate Mentor, Protect).

**Experiencing pressure to develop skills**

When it came to developing skills, the perception was that consultants could easily get stuck in a role that was not a good fit or did not offer development opportunities. Nigel felt that in a smaller consultancy like Perform you were more likely to be pulled into a different sector because you had the best skillset available whereas his previous experience of working in a large consultancy was there was sufficient resource for you to be saved for work in your specific area. Simon was working alongside Rula on a client engagement. Although they were both Managers, the engagement was within Rula’s specialism and she was taking the lead. Simon accepted this even though there was little he could gain from the role from a skills development perspective:

*...she’s taken the helm really... for the simple reason that she’s an energy and utilities person. It’s more likely that she’ll have more longevity here than I would because I’ll more than likely move onto a public sector client,*
Next time, it could be the other way around. It’s sometimes better not to have too many chiefs (Simon, Manager, Perform)

Management consultants from all settings and all levels experienced pressure to develop business development skills. At more junior levels this was interpreted as flagging opportunities or extending your role. Managers aspiring to get promoted to Senior Manager were expected to develop external networks and new business with new and existing clients. Rula felt this was a major challenge and not something that was necessarily within her control:

I suppose one of the things that’s a bit of a challenge in consulting, is that the more you go up, I find the more important business development is for you. And I suppose the challenge that comes through that is that a lot of it is an element of luck, being in the right place at the right time or you knew someone at university who is now a CEO (Rula, Manager, Perform)

Management consultants from Protect experienced tension between their own development needs and the perceived needs of their client. The long-term nature of the Protect client engagement meant that consultants felt under considerable pressure to rotate out of the project, to develop new skills, and be able to demonstrate that they had developed the competencies relevant for their grade and to support promotion to the next grade if appropriate. Protect had a general aim to rotate consultants out after six months in a role. However, Amy experienced resistance from the client:

even though we are consultants the client expects you to be in a role for a long period of time rather than quickly coming in to do a piece of work then leave. ... my first engagement was with this client for just under two years in
different roles and then when I went to leave, they were oh no you can’t leave yet why are you leaving so quickly? Two years! .... (Amy, Senior Consultant, Protect)

5.3.3 Experiences of career progression

Managers experienced varying levels of pressure to progress to the next grade. The majority of Managers from Achieve felt little pressure to progress to the next grade. They felt that they were very well paid, were content in their roles and happy to just grow with the business. Managers from Perform and Protect experienced some pressure to progress to the next grade whether this was pressure from the consultancy or pressure they put on themselves. However, they felt career paths beyond Manager were vague or very focused on business development. Pressure to progress in all consultancy settings was experienced more acutely at grades below Manager. Nevertheless, some consultants were reluctant to progress because they perceived the new role involved different competencies and separation from established ways of working that would be disruptive and did not feel ready to make the transition. Others felt that career paths were unclear or perceived being stuck, let down by the system. Those who were able to progress felt a sense of loss for a role they enjoyed.

Career path unappealing or unclear

Jack was reluctant to progress from Senior Consultant to Manager just yet as his perception was that it was a completely different role. Jack really enjoyed delivery, getting immersed in a single project, throwing himself behind it and getting it over the line. Jack’s perception was that would change a great deal when he does become a Manager and he did not feel ready:
... As a manager I would probably be overseeing more than one piece of work and expected to bill a lower proportion of my time to client work and to spend time on business development and that sort of thing... Whereas at the moment I am billing five days each week and that's what I am measured against and I quite like that ... It won't be forever but, yes... (Jack, Senior Consultant, Achieve)

In Achieve where management consultants experienced an emphasis on patronage rather than process, Walter felt that he had absolutely no idea of the criteria or the skills required to progress to Manager:

... “we're not very good at career progression. I'm a Senior consultant now...if you ask me: how do you get to manager? I would say, no idea. I've no idea which boxes to tick. No idea what the criteria are” (Walter, Senior Consultant, Achieve).

**Feeling let down by the process**

The career manager has an important role in facilitating career progression and some participants felt let down. Amy experienced feeling stuck when her career manager went on paternity leave and her temporary career manager did not have time to support her promotion case:

_I was going for a second promotion quite early and if he had turned round to me and said well you are not quite ready I would have accepted it. But he wasn’t even interested in talking to me about it. He didn’t know me, and he didn’t have time to sit down and talk to me to find out what I had been doing and why I thought I was ready. He didn’t speak to my career manager about_
it and I ended up not going for it and I thought well they are kind of putting my career on hold. (Amy, Senior Consultant, Protect)

Rena was placed on an internal project office role when she joined and did not feel that she got sufficient support from her career manager to move to a different role. As a result, she did not feel that she had gained sufficient consulting experience to go for promotion at the same time as the rest of her graduate cohort. She eventually found a consulting role and successfully went for promotion six months later:

they use consultants for internal project office roles and if they like you and you are good at it, it doesn’t really matter what you want if you are quite good at it they will try and keep you in that sort of role. You have to know the right people or stamp your feet a bit to get put on different roles (Rena, Senior Consultant, Protect)

Moving up and letting go

In contrast, Horatio developed a clear vision of what he wanted to achieve and approached career progression strategically. It was before the graduate scheme existed in Protect but Horatio carefully selected his career manager and gained the support of his practice head to enforce his own informal graduate scheme, moving roles every six months early on and persuading managers to allow him to take on roles he was capable of rather than capping him at roles that were appropriate for his grade and experience. Horatio had moved up through the grades to senior manager in a very short time:

my mantra really was never do the same thing twice. So, once I had done something for a bit and I felt I understood it I would try and move on (Horatio, Senior Manager, Protect)
Horatio felt that what had changed the most was that, as a consultant he was just responsible for himself and what he had to deliver. Now he was not just responsible for the people he managed but also for the people that they manage and the people that they manage and the whole client relationship.

Those that did progress did so by ensuring that others perceived they were already fulfilling the requirements of the new role. Nigel had recently been promoted to Director at Perform. Nigel felt that to get promoted to Director in Perform he had to demonstrate to senior stakeholders that he was already performing the role of Director

> At that transition point to Director ...I had to be doing the role of a Director before I got promoted (Nigel, Director, Perform)

Some felt a sense of loss for their old role. John had focused on career progression to a senior position where he perceived he would have more autonomy and control over his work-life balance. John reflected on the differing demands of being a Director compared with being a manager. Achieve is now relying on John to develop productive relationships with senior “C Suite” Directors of firms within his chosen sector. There was far less focus on managing teams and John felt this was a big change. He had a great track record of managing and motivating teams, and he found it difficult to let go:

> You become very good at taking teams out for drinks and getting everybody on side ... everything is good. But I have to make sure that my Managers are doing that now and I have to give them the control and the autonomy to do it (John, Director, Achieve)

John liked managing teams and felt it was what he was good at and what he was known for. He felt a sense of loss for a role he enjoyed
5.4 Experiencing different kinds of belonging and separation

Management consultants from all consultancy settings experienced a sense of belonging to their consultancy. However, some experienced a gap between their desired sense of belonging to their consultancy and the actual experience. They also experienced a sense of belonging to a range of different kinds of liminal community, informal anti-structures or communitas that existed alongside formal consultancy structures (Turner, 1969). In this major theme I first present data on how management consultants experience a sense of belonging to their consultancy team community on client site. I then present data on their experiences of developing and maintaining informal consultancy networks. Finally, I present data on management consultants’ experiences of feeling detached or even abandoned between their client and consultancy systems.

5.4.1 Experiencing belonging to a consultancy team community on client site

Management consultants on client site experienced their consultancy team as a team within a broader client-consultancy team. They often experienced this as a close community, a safe place where they were able to discuss problems that the team would not want to share with the client. They might also experience a sense of support from colleagues who are going through the same thing and formed a strong bond which they experience as a community almost like family:

*We have weekly consultant only meetings ...And it’s a chance for us just to get things off our chest and to share what we wouldn’t necessarily want to share directly with clients. But also... to identify things that we’ve all seen, and we can then start to raise them with clients in the right way. So, there’s*
this weird... we’re embedded with clients so we’re one team but at the same time we are a team within a team. (Neville, Manager, Perform)

Simon experienced a strong bond with his consultancy team on client site. He felt consultants working together should look out for each other and follow what he interpreted as the unwritten rules of consulting where in his view the emphasis was on being a team player:

We stay glued together as a team. We have weekly consultant only meetings and we do other activities just to keep connected ... but if people either don’t understand the rule book or they don’t for whatever reason want to play by that rule book because they want fame, glory and ... want to steal everyone’s thunder ... I think actually you kind of have to tackle it head on (Simon, Manager, Perform)

This closeness and camaraderie with consultant colleagues on client site which felt to them like family was experienced even more intensely when the consultancy team were away from home. Although Walter perceived the intensity as a temporary phenomenon:

Those are the guys that you go through the forming, storming, norming, and performing stages with... Those are the guys that you will fall out with, and then make up with, and then you’ll go for a meal with. Those are the immediate working family. But again, that's a start and an end of it really... right? After that you will probably still keep in touch with them. But it won't be as intensive anymore. (Walter, Senior Consultant, Achieve)
There were occasions when teams working away continued work in the evenings in the hotel. Rula felt it was helpful when team members were open and willing to working together, fixing problems in the evenings:

*when I’ve been out of town, if you’ve got a problem you can just sit together*  
*out of work hours, in the hotel and work together and get something*  
*fixed…And I think people being open and willing to do that is helpful when*  
*you’re in that sort of environment (Rula, Manager, Perform)*

### 5.4.2 Experiences of belonging to an informal consultancy network

Management consultants of all levels experienced support from informal networks with peers and mentors within the consultancy. The graduate network in Protect was well established and supported by formal structures to the extent that participation seemed to be expected. Some felt involvement in internal work was a good way to connect with peers. Networking was a particular challenge at all grades in Achieve. Consultants were based at home which could be anywhere in the UK, and generally worked away from home during the week. However, informal networks had developed, communities that participants relied on to supplement formal networks. Achieve encouraged Managers and Directors to provide informal pastoral support to more junior consultants and facilitated informal networks by publishing the location of their consultants each week so that those who were geographically close could meet up.

**Informal networks with peers and mentors**

Consultants formed informal networks with peers across the consultancy. This was particularly evident amongst the graduate intake at Protect. In the initial years and even
later in their careers, consultants felt a sense of belonging to their graduate community and felt there were benefits:

*the graduates that I started with ...even though we are all on different projects, we still keep in touch, we message and go out for dinner...When we speak we are all giving tips, and one might say you know I am talking to this person I have got quite a lot of courses scheduled what are you doing?*  
(Faith, Consultant, Protect)

Directors also experienced support from informal networks of peers they felt they gravitated towards and able to bounce ideas off:

... you create your own support network and those are the people that you gravitate towards and that you can have an open and honest discussion with... (Alistair, Director, Achieve)

Managers and more junior grades used informal networks to draw on the experience of others in the consultancy. Perform organised all consultancy quarterly meetings abroad and consultants felt these were a great way to maintain and build informal networks. Neville preferred informal relationships with peers and seniors so that he can just reach out when he needed to. His perception was that informal network he was able to build at the quarterly meeting away from home was similar to the informal team bonding he experienced on client site:

*So just through our three-day presence in Spain, where we did some group work and exercises...it was just being around each other, I identified some people who I need to reach out to. So, it is some form of team bonding not*
really typical because usually you are on client site and you do something for a client (Neville, Manager, Perform)

Using internal work to network

Some consultants felt involvement in internal work was a good way to connect with informal networks. They experienced internal teams as far less formal than client-facing teams:

the nature of internal work is also much more informal...you can have a laugh and a joke and sometimes a beer or whatever else when you're having the meetings...it's a good time to connect and... almost let your hair down a little as well (Rula, Manager, Perform)

Lennie felt his internal team went out of their way to enable him to attend when he could not be there in person:

for example, I have got a meeting with one of the internal teams I work with after work today. I can't make it in person, but they will provide dial in facilities for me to join. It's things like that that's really helpful (Lennie, Consultant, Perform)

Providing informal pastoral support

Management consultants in Achieve were based at home, which could be anywhere in the country. Client engagements were more geographically dispersed and management consultants were usually on projects that involved staying away from home during the week. They perceived this made informal networking and gaining a sense of belonging more difficult. Achieve published the location of each consultant every week to encourage
consultants to meet up if they were close by. More experienced Managers felt that providing informal pastoral support to colleagues beyond the more formal support provided by Career Managers was important. Bernard felt a responsibility for the wellbeing of others who may not be coping that well:

... to survive in this career, you have to be really good at connecting with others. As you get more senior, there is a degree of ... pastoral care which makes you reach out to those who maybe don’t do it so well. Just to make sure they are not feeling isolated (Bernard, Manager, Achieve)

5.4.3 Experiencing feeling detached or abandoned between the client and consultancy

The nature of consulting and the remoteness and small size of some projects meant that consultants sometimes experienced feelings of detachment from the consultancy and felt they were losing their sense of identity and perspective as a consultant. Some experienced feeling distant and even isolated from their consultancy. In contrast, the long-term nature and large size of the central government project meant that experienced consultants felt concerned that colleagues were “going native” disconnected from their consultancy system and identifying more with the project than the consultancy. There were times when management consultants felt the support they should expect from formal and informal sources was not forthcoming. This left them feeling unsafe, tricked and abandoned by their consultancy and sometimes the team around them.
Experiencing feelings of detachment from the consultancy

Some consultants reported feeling detached from their consultancy. They felt distant and even experienced feeling a loss of identity and perspective as a consultant. This was often because of the remoteness of the location and the small size of the project.

June was working on her own on client site and had only been back to base once in the last year. She was still in regular contact with her engagement lead and Career Manager. June felt supported but nevertheless somewhat distant:

> I went to the base office maybe once last year, which is odd especially when you’re not really with a team. I don’t go home concerned about that really, but you feel a bit distant sometimes. (June, Senior Consultant, Achieve)

Some participants felt that the remote nature of some projects made it difficult to keep in touch with their consultancy. Horatio experienced feelings of isolation as a manager working on a small project that was not within travelling distance of base:

> I think at those grades in the middle I felt a bit isolated because when you get to more senior levels you start reporting into the owners of the project which in itself is a networking opportunity and you get to know the Directors. And when you are a consultant you have your informal network where you meet on Fridays and have a few beers. But at intermediate levels (Senior Consultant and Manager), perhaps you are running a small project, or you are part of a project with not a lot of internal networking opportunities (Horatio, Senior Manager, Protect)
James felt it was important to go back to base and connect with his consultancy network and maintain his perspective as a consultant:

*I think when you are on client site every day... that can be great from a relationship perspective, but you lose that sense of perception that I am there to deliver a service. By coming back here (base office) ... it just keeps me in balance. Just so I am not fully subsumed, and tunnel visioned* (James, Senior Consultant, Perform)

Sam recalled a long-term project where he was staying away from home and had to make a special effort to keep in touch. Sam felt he was losing his identity as a consultant:

*You lose that identity if you spend two years working there and you have not attended anything. So, I was still quite good at making sure I would still attend networking events back in London at the time, but certainly colleagues of mine were just completely out of the loop* (Sam, Manager, Protect)

**Going native**

Consulting engagements in Central Government consulting tend to be longer term. The overall size of the Protect team on client site was quite large, in excess of one hundred consultants including a senior team. The project held regular social activities to bring team members together and the perception of some was that the project team had become a sub-set. Warren was concerned that some consultants had become completely detached from the consultancy:

*they are so immersed in the client side that they have just lost any sort of... they have gone native! So, I think you just need to pull yourself out from*
that... and attend all of those (consultancy)networking events – get back to
the mothership ....and get your head back in that space (Warren, Manager,
Protect)

Amy shared Warren’s concern. Since the client had banned the use of consultancy laptops
on client site for all but the most senior members of the consultancy team, Amy felt that
the impact of the ban meant that consultants were not even logging on and this was
enforcing the detachment from Protect:

they just have no idea what is going on and you tell them about something,
and they say when did that happen? Well about a year ago, and they just
haven’t got a clue you know. We can do our timesheets on our phones, we
don’t have to log on to do it, so most people don’t really log on and see
what is going on. (Amy, Senior Consultant, Protect)

Alexander and Faith joined the project team immediately after their induction. The project
was all they had known and, despite only being required on client site from Monday to
Thursday, they saw little point in going back to base office on Fridays preferring to work
at home. Faith feels she can get more work done at home on Fridays:

I am on client site from Monday to Thursday and I work from home on
Fridays. I am never at the base office. I did attend a Forum a while ago and
my pass didn’t work, and I realised I had not been there for ages (Faith,
Consultant, Protect)

Alexander felt everything he needed was on client site. He saw the senior team having
meetings and skype calls on client site and perceived this as evidence that there was no
need to go back to base:
for me, what I have seen is that you don’t need to actually need to go back physically at all and what works for them is having this regular catch-up via phone, via skype, and it is enough for them and it seems like they get a lot done as well on these calls. If I want to know anything, I ask them

(Alexander, Consultant, Protect)

**Feeling abandoned by formal and informal consultancy structures**

Some female consultants felt abandoned by the formal and informal structures of their consultancy when they experienced discrimination and even what they felt was abuse from clients and did not experience the support they expected from their consultancy or from the team around them on client site. When she was with her previous consultancy Rula worked for a client from a culture that did not value women in the workplace. Rula made several complaints to Human Resources and the Leadership Team of the consultancy but was ignored. She perceived that the project had been under-scoped and undersold and that the pressure had a negative impact on the team community. When Rula perceived a lack of support from formal and informal consultancy structures she felt abandoned, unsupported and unsafe.

...I think when you don’t feel that... psychological safety in your team, it’s difficult to be successful. Because actually who knew what was going to happen day-to-day? Who knew what the client was going to do? And we weren’t even aligned as a team...and it was, will they throw me under a bus today? ... If someone went at me and I got upset because they made a comment about my gender, who would help me? Who would stand up for me? That wasn’t ever clear. (Rula, Manager, Perform)
Anna also felt somewhat abandoned as a new consultant when she was placed on an engagement where the client had a bad reputation for harassing female consultants.

they (Perform) didn’t do a lot for that at all... the client was known for it, had a bad reputation for it. HR had been involved with other people. But you know that particular instance was when I first started here...it went on for a year but, I wouldn’t put up with that now (Anna, Manager, Perform)

Nigel previously worked for a large consultancy. Immediately after he got married Nigel was on a project overseas for six months. When the client engagement came to an end the consultancy wanted him to work overseas again. Nigel pushed back but the consultancy put pressure on him to go saying the project was for just three months. At the end of the three months the partner told Nigel he was going to be extended because that was what the client wanted, and he had no choice. Nigel felt tricked and abandoned by his consultancy

the partner said ... this is consulting, you know what it’s like, you’re going to be extended and it is what the client wants and stuff like that. I was like you’ve just basically mis-sold this to me to get me here and then try to keep me here (Nigel, Director, Perform)

5.5 Chapter conclusion

Management consultants experienced tension between the demands of the client system and maximising their utilisation on client engagements on the one hand and the demands of the consultancy system to make an internal contribution to the successful operation of their consultancy, develop skills and progress in their career on the other.
The nature of internal consultancy-facing work meant that many internal tasks and responsibilities were ongoing and must be performed alongside client work. Management consultants experienced themselves as coping in a number of different ways. They separated mentally and sometimes physically, transitioning to a mental state where they felt able to focus. For less complex work they experienced transitioning spontaneously. Others experienced compartmentalising preferring to use the interstices of the day or their own time in the evenings and at weekends to perform internal work. Many performed internal work on Fridays when it was commonplace for management consultants to work from base office or home. Some management consultants preferred compartmentalising client and internal work because they experienced guilt when completing internal work on client site or felt fearful of a negative reaction from the client. Some pushed back on internal demands when they experienced a particularly demanding client engagement or in the case of those at lower grades in Achieve, because of the lack of recognition. The perspective of Senior Managers and Directors was more holistic. They experienced greater synergy between internal and client work and transition was more spontaneous.

Management consultants experienced the pressure of the performance expectations of their consultancy to maximise utilisation, impress the client, develop skills and progress to the next grade. Management consultants perceived the performance management and career development process as open to exploitation and felt pressure to be visible to senior people in the consultancy who would speak up for them. They perceived there was an internal job market and a risk of being stuck in a role that would not provide skills development or in a sort of limbo, between roles, on the bench. For some the route to career progression was not straightforward. Some felt let down by their Career Manager, others perceived career paths were unclear, or the role was unappealing, and they felt cut off from advancement opportunities. The performance management process in Achieve
was more to do with patronage. Management consultants in Achieve perceived the only way to get the best roles and to progress was by aligning with a Manager or Director and consistently doing good work for them. In all settings, those that did progress did so by ensuring that others perceived they were already fulfilling the requirements of the new role. Some felt a sense of loss for their old role.

Management consultants experienced a sense of belonging to their consultancy although reporting to multiple managers, belonging to multiple teams and the pressure to maximise their utilisation on client site meant that the attachment they experienced to their consultancy was somewhat ambivalent. They also experienced a sense of belonging to and source of support from informal consultancy networks with peers and mentors. They experienced the consultancy team on client site as a team within the broader client-consultancy team. A further source of support and a safe place to discuss problems away from the client. They formed a bond which they experienced as like family. The experience was even more intense in teams working away from home. However, there were times when the remoteness of some projects caused management consultants to feel detached, and that they were losing their sense of identity and perspective as a consultant. There were also times when management consultants perceived the support, they should be able to expect from formal and informal sources, was not forthcoming leaving them feeling unsafe, tricked and abandoned by their consultancy.
6 Striving for work-life balance

6.1 Chapter Introduction

In this chapter, I present data on the third and final superordinate theme which concerns management consultants’ experiences of the competing demands of their work systems, both consultancy-facing and client-facing, and the demands of their personal system of engagement. I first present data on the challenges experienced by consultants of the so-called consulting lifestyle and the expectation that they will work long hours and stay away from home wherever and whenever needed to fulfil the requirements of the client engagement. I continue with management consultants’ experiences of travel between work and personal systems of engagement. I then present data on management consultants’ experiences of managing work-life boundaries and the varying levels of control experienced by management consultants at more senior grades compared with those at more junior grades, and the impact of this on their ability to set firm boundaries. I continue by presenting data on the perception of some female consultants at lower grades that the lack of control they experienced meant combining a career in consulting with having children was not feasible for them. Finally, I present data on management consultants’ experiences of making the consulting lifestyle work in a sustainable way through support from personal systems of engagement and their experiences of finding ways of maintaining mental and physical wellbeing.

The chapter follows the structure of emerging themes from the analysis outlined in Chapter 3; Methodology, as shown in Figure 6-1 below:
6.2 Experiencing the challenges of the consulting lifestyle

In this major theme I first present data on how management consultants experienced being away from home and how this differed according to their own personal system. I then present data on management consultants’ experiences of working long hours, how experiences differed when working away from home and how many felt working long hours was expected and accepted practice for management consultants. Finally, I present data on how management consultants experience travel between work and personal systems.

6.2.1 Experiences of working away from home

All consultants in the study were required to sign up to client engagements that involved staying away from home when they joined. However, consultancies differed in their demands. Management consultants from Achieve were typically away three or four nights each week and were sometimes required to travel abroad which could involve going away...
for two to three weeks between trips home. In contrast management consultants from
Protect were engaged in consulting for Central Government. The majority of the work
was in central London, which was within commuting distance for participants, and they
experienced very little pressure to work away from home. More experienced management
consultants from Protect had experienced working away from home. Management
consultants from Perform were also involved in a project based in central London.
However, the majority had experienced projects that involved staying away from home,
either with Perform or with a previous consultancy.

When working away from home, some management consultants experienced a sense of
loss and sacrifice. They experienced themselves as missing the time they usually spent
with family or felt frustration at not being able to experience a social life. Others felt that
it put a strain on relationships. Some found the early Monday morning start overshadowed
the weekend causing work life to seep into personal and family life. Some management
consultants preferred to undertake a significant commute to avoid having to be away from
family, feeling that even though this left little time to spend with family, at least it was
their own time. Although location was perceived to be an important factor in the
experience of being away from home, there was an overall sense of acceptance and a
feeling of just having to make it work.

Neville felt a sense of sacrifice and loss when working away from home. He missed the
time he usually spent with his wife and son:

... my day-to-day routine would be having dinner with my son and my wife,
put him to bed, and then suddenly changing that to a different routine...I
want to call my wife and our son every day and if I am off-site for some
June found it frustrating that she could not have a social life during the week and could not even guarantee what time she would be home on Fridays:

*trying to have a social life when people have a party or something during the week ... or if someone wanted to go for dinner... And not knowing where you’ll be is not great. Even on a Friday, let’s say something was happening at six o’clock. I have to make someone aware that I’m either going to have to leave early or work from home that day* (June, Consultant, Achieve)

Alistair found that when he worked away from home for long periods earlier in his career it took a huge toll on his personal life. He felt that his relationship with his now wife survived against the odds:

*I spent eighteen months living out of a suitcase ...that took a huge toll on my personal life... fortunately, I am now married to the person I was with at that time... I would leave at two in the morning on a Monday ... and getting home on a Friday night, I would be absolutely exhausted, and it just wasn’t much of a weekend.* (Alistair, Director, Protect)

Nigel found it tough being away with his previous consultancy. He was in Switzerland for nearly six months, and he felt the early Monday morning start overshadowed the whole weekend:

*...it was a 03:30 start on a Monday, which was a nightmare, and then back on a Thursday night ... It was really one of the toughest things I’ve done. You’d wake up on a Sunday and get an alert on the phone, “you can check*
in now”. It does your head in first thing on a Sunday morning. Then you’d be thinking about work, I’ve got to pack, I’ve got to go to bed early because I’ve got to be up early... (Nigel, Director, Perform)

James preferred a significant commute to achieve what he perceived as a better work life balance by avoiding being away from home and what he perceived as being locked away in a hotel:

"and it was very long days because of the travelling, but at least the time that I did have when I was at home, it was my time and I actually had it at home, and you know I was able to spend time with friends and family. And being tired, that for me was much better than being locked away in a hotel" (James, Senior Consultant, Perform)

Simon felt location had a big impact on the experience of working away. His perception that it could be quite fun, but you have to find ways to make work indicates that Simon was experiencing having little choice and having to make the best of it:

"I think it really depends where it is. I think I’d much rather be in a city than I would be on a coal power plant as I was, or in a small town or in a business park or something. It really depends. And actually, it can be quite fun,... But I think you just need to find ways to make it work." (Simon, Manager, Perform)

In contrast some management consultants saw travel as an opportunity and one of the attractions of a career in consulting. They valued the life experience and the excitement. Others experienced being away as an opportunity to get on with internal work and welcomed the lack of distraction. More junior management consultants from Protect who
had not so far been called on to work away from home seemed to feel they needed to get it over with, regarding it as a skill they needed to develop

Rula joined her previous consultancy straight from university and chose to be continuously away for almost a year working on client engagements across Europe, partying hard but with no home life:

_It’s kind of an all or nothing really... Hard work but partying hard and no life at home at all, just parked it, essentially. I just stayed in hotels all the time... Took my car off the road and put everything in storage_ (Rula, Manager, Perform)

Rula really enjoyed the work, visiting different areas of Europe at the weekends and the social side of being on a large project away from home. Rula felt the downside for her was not being able to maintain a relationship with anyone but that the life experience and career advancement she gained was a good trade-off for her at the time:

_It was a perpetually single life... it was either date someone you worked with or date no-one because it’s just not sustainable. But I also got to stay in Milan and Paris and fly somewhere every other weekend and things like that. And it was good for my career, I got accelerated promotion Based on my priorities at that time, it was a good trade-off._ (Rula, Manager, Perform)

Keira was also attracted by what she perceived as the variety and excitement of the consulting lifestyle. As a new recruit, away from home on her first project, Keira felt very excited and enjoyed the social side:

_I thought it was very exciting I got my corporate credit card I remember being on the phone to Mum and going yes, I feel like ... this is what working_
life is all about there was a big group of us up there and although we were
on different projects, we were all there together and we would make an
evening of it (Keira, Senior Consultant, Protect)

Kylie liked to focus on work during the week and get all her internal work done during
the evenings. She welcomed the lack of distraction when working away from home:

you have those evenings to do the internal work that you need to do without
the distractions you might typically have at home (Kylie, Senior Consultant,
Perform)

As time had elapsed and more junior management consultants in Protect had not been
called on to work away from home, they had begun to see prospect of working away as
quite daunting. Alexander saw it almost as a skill he should develop:

... you are literally living out of a suitcase by the sounds of things...one of
the pieces of advice I got off others is that it is nice at first, the first two
weeks staying in a hotel, the free breakfast the free lunch the free dinner,
you will love it. But then after two weeks if you haven’t got people to go out
with, you go back to your hotel room ... and it becomes quite lonely. But it
is something I would like to do so that I know that I can do it (Alexander,
Consultant, Protect)

6.2.2 Experiences of working long hours

Management consultants perceived that working long hours was accepted and even
expected as part of the job of being a consultant whilst at the same time being aware that
they needed to achieve some balance. Nevertheless, management consultants often
experienced the demands of client and consultancy systems spilling over into personal time. Many participants reported working longer hours when they were away from home because they felt there was nothing else to do. Some management consultants experienced working long hours being taken to extremes with consultants working well into the evening and the early hours of the morning, well beyond filling time because there was nothing else to do. Others did not see working long hours away from home on internal tasks as work because they were passionate about the topic, or did not see time during the week away from home as their own time.

Neville perceived that working long hours in consulting was accepted as normal. He felt it was inevitable that extra hours would be required to invest in internal work, and that this was expected:

> Reality is you will need to invest extra time... no matter how hard you try, that just happens. So, some extra hours here and there are inevitable... Well that is the reality of our profession, we are all here for that (Neville, Manager, Perform)

Noel found the pressure of what he perceived as everyone working long hours unrelenting and quite stressful. He recalled sending emails at one-thirty in the morning UK time when he was on a project in India and getting replies:

> When I was working in India, I used to send emails at seven in the morning which is one-thirty (a.m.) here, and still get replies. And you go, well, do you never sleep? It’s constant, the barrage of emails, but it can get stressful. It takes a toll on you… (Noel, Senior Consultant, Achieve)
Sam felt he was continuously striving to find work-life balance whilst also meeting the demands work systems and career development expectations:

there has got to be a cut-off point where you think you have completely lost the work life balance and all you do is work. So, I have always tried to keep a bit more balance whilst at least kind of living up to the expectation that has been set by your Career Manager and what you are doing to further your career. (Sam, Manager, Protect)

Keira experienced what she felt were the impossible demands of client and consultancy work both spilling over into personal time on what she perceived as an under-resourced project where the team were locked into working beyond normal boundaries to protect the reputation of the consultancy:

And it got to the point where it had to be a choice between client work and delivery, or the other things, and there just wasn’t time for both. And I think that is something that is very hard to manage. Because the fact that you are having to work overtime on client work means that you don’t have time for those other things ... everything is still afloat, because everyone is working so hard ... we were almost going to have to let a ball drop somewhere and they don’t want to do that... (Keira, Senior Consultant, Protect)

Management consultants reported that they worked longer hours when they were away from home because there was nothing else to do. James felt that despite best intentions the tendency was to just work in the evenings when he was away:

I am not near my family not near my friends ... the team was quite small. I didn’t then want to spend the evenings with the client so ... I would go out
walking or would go to the gym and ... I would do stuff in the area and... I suppose you start with good intentions but nine times out of ten when you are away and you are in a hotel and you have not got anything to keep your evenings occupied so you just end up working (James, Senior Consultant, Perform)

Sam had observed what he perceived as some colleagues consistently taking working long hours to extremes:

... well the latest I ever stayed in that office, and it was a one-time thing, was half past eleven at night.... But I think the latest record was someone staying in the office until half four in the morning which just seemed utterly ridiculous. But people were consistently working until midnight on that project (Sam, Manager, Protect)

Walter felt it was not unusual to work long hours away from home, especially when delivery deadlines were approaching. He recalled a project with his previous consultancy where he experienced working long hours which he felt were extreme:

I still have the picture I took of the parking ticket from eight a.m. until four a.m. the next day. Coming to the hotel, quick shower, half an hour of sleep, check out. Go back to the office right. So that wasn't great (Walter, Senior Consultant, Achieve)

Jill can’t remember a time when she has not worked away from home during the week. She uses her evenings for internal consultancy facing work but does not see working long hours in the hotel in the evenings as work because she is passionate about the topic:
So, despite me being logged on until quarter to eleven last night it did not actually feel like work it felt quite exciting to me because I am helping to shape the way we can support our colleagues to perform and manage their performance (Jill, Manager, Achieve)

June uses evenings away from home for internal work. Although she acknowledges evenings away from home as her own time, she sees the time as of less value to her than time spent at home and does not experience it as her own time:

I would try and get the non-client facing stuff done maybe as I’m having my dinner or something in the hotel and even so you sort of see it as your time, but it’s not as much your time as an evening at home might be later in the week (June, Senior Consultant, Achieve)

6.2.3 Experiencing travel between work and personal systems

Working away from home inevitably involves management consultants having to travel long distances. Their experiences of travelling between work and personal systems varied. Some dreaded the long journey finding it isolating and frustrating and experienced difficulty in transitioning between work and personal systems. Some found it emotionally draining and were unable to perceive any benefits. Others used the time to relax, accepting it as just part of the job, or perceived being able to use the time to separate work and personal systems.

Jill found the five- and-a-half-hour journey at the beginning and end of the week difficult to cope with. She experienced frustration and isolation and experienced difficulty in transitioning to personal systems:
I'd be up at 4 o'clock in the morning and I don't... the only way I can describe it is when you get up for holiday really early, but you have had a poor night’s sleep and you feel like you have got head cold coming on. It was like that every Monday morning and every Thursday or Friday when I got home... So, for me it was very, very difficult on a Monday to transition from Jill at home to Jill in the office .... I can get quite frustrated at myself and I can’t spend a long time in my own company... But I find that the most difficult transition is then getting home and switching off (Jill, Manager, Achieve)

June also hated the long journey and often travelled the night before to avoid an early start. However, she was less able to choose the time she travelled home and found the journey emotionally draining and often felt like crying when she got home:

It’s a long journey. and I find it quite emotionally draining because the train gets delayed...or it’s quite noisy, you know...and different senses working overtime ... smells, somebody’s eating something disgusting and somebody’s crying and like four hours of this is just madness. So...things aren’t always bad, but they’ve got the risk of being terrible and it’s, you know, you come home and think you feel like crying ... on those days it’s too much. (June, Consultant, Achieve)

In contrast Alice found travel relaxing. A time when she did not feel compelled to work. She was philosophical about the long journey and just sees it as part of the job. She loved seeing different cities so for her, travelling was worth it:
it is four and a half hours on the train, but I am sitting there, and I am
relaxed. I don’t always work when I am travelling so, slept a bit, read a bit
you know, just used the time, maybe not wisely, I don’t know... and although
it is two changes the changes just work pretty well and it is not like I am
hanging around for too long. So the travelling is, it’s part of the job. I love
seeing different cities, just experiencing different areas (Alice, Senior
Consultant, Achieve)

James, having opted for a long commute rather than staying away from home, used his
time on the train for what he perceived as separating his work life and his personal and
family life:

I like to maintain some sort of separation between work and my personal
and family life and I don’t like to find that I come home, and I bring like my
stress home because that’s not fair. And I use the train home to decompress
from work. But actually, some of the thoughts that I have got out in my end
of the day stress need to speed to get things through, actually then start
informing some of the things that I need to work through the next day
(James, Senior Consultant, Perform)

6.3 Experiences of managing work-life boundaries

In this major theme I present data on the varying levels of control experienced by
management consultants at higher grades compared with those at lower grades and the
impact this has on their ability to set firm boundaries between work and personal systems.
Also, the perception of female consultants at lower grades that the lack of control they
experienced meant combining a career in consulting with having children was not feasible
for them. I then present data on management consultants’ experiences of setting firm boundaries between work and personal systems and how some saw the demands of work systems as a trade-off against what they perceived as the benefits for personal systems.

6.3.1 Experiencing different levels of control

Participants reported a wide range of experiences when managing work-life boundaries. Management consultants at lower grades felt that they had very little control over when and where they worked and that high utilisation targets meant they were more likely to have to flex boundaries between work and personal systems. In contrast, management consultants from Protect who had not been called upon to work away from home felt more able to say no to such requests knowing that others may be available and there would be other roles. Directors and Senior Managers felt that they had far more control over where and when they worked. They had worked towards a position where they perceived they could achieve a work-life balance that worked for them.

The perception of management consultants at lower grades was that they lived with uncertainty and may be asked to travel at short notice. Even when they were involved in a client engagement, they felt it could end for reasons beyond their control. Conversely, engagements were often extended beyond the initial end date.

As a Manager, Warren experienced a high level of uncertainty and did not feel that he had much control over where he worked:

... just not knowing ... you are not in control and you could be moved into a different role but that doesn’t matter because you need to still be bringing in billables ... (Warren, Manager, Protect)
Walter felt that his high utilisation target meant that he could only have limited influence on which projects he was assigned to and, although he could outline the types of projects where he wanted to gain experience, billing took priority. This also applied to project location although Walter did feel able to say no to going overseas:

*The one thing that I definitely... I can influence is, if they say there is a project in India, do you want to do it? I could say no. Probably if someone said there's a project in Sheffield, do you want to do it? I would say Sheffield, mm, uh, then probably that wouldn't go down well* (Walter, Senior Consultant, Achieve)

In contrast, Amy does not feel any pressure to work away. Amy signed up to working anywhere but during her four years with Protect she had always worked in Central London. Her perception was that the consultancy struggled to find people to work away but that no-one would ever be forced:

*it is quite surprising how many people don’t want to work away from home ... And we quite often struggle to place people ... Resourcing will move on to asking someone else or it will be just a temporary fit until they can find someone else. I don’t think we have ever placed anyone that didn’t want to go. It did feel when I first started that it was very much like I go where I am put and I was quite happy to go anywhere but I was always based in London* (Amy, Senior Consultant, Protect)

Directors perceived they had more control over where and when they worked and were more able to plan. Alistair perceived there was far less need for him to be continuously away from home.
I have worked away from home but again it is one of the benefits of having stayed in consulting. The more senior you are the more control you have over where and when you work. It is a bit like jam tomorrow. (Alistair, Director, Protect)

John perceived early on that he would have to reach a more senior level to have control over where and when he worked. John felt that he had now reached a position where he and his wife could have a work life balance that worked for them:

And that has actually worked out quite well. Now my model is... home on Monday and Friday and maybe three days away, two nights away, in the week. That works out okay and that means that I am around to do things like homework and support my eldest going through starting secondary school... just be present when they need you (John, Director, Achieve)

June has had more autonomy to manage her days on her current project and likes it. June felt the challenge was not quitting before she gets to a level where she has more control:

I’ve been able to manage my own days a lot better and I really like that. And you know, thinking maybe some ...more senior people I think are able to do that a little bit more than people within my grade .... So, I think the challenge is really ...can you get to some resolution that will mean that you don’t quit before you get to that level? (June, Senior Consultant, Achieve)

6.3.2 Perceiving gender as a barrier to a career in consulting

Female consultants from Achieve where the majority of client-engagements involved staying away from home during the week felt concerned that a long-term career in
consulting was not feasible if they wanted to have children. They lacked any role models of similar age and grade with young children. Female consultants from Protect expressed concern about their future career even though they had not so far been called upon to work away from home.

The lack of control experienced at more junior consulting grades and the absence of female role models with young children meant that many female consultants from all consultancy settings expressed feelings of concern about being able to meet the demands of consulting if they decided to have children in the future and this was leading to some uncertainty about the feasibility of a long-term career in consulting.

June had recently got engaged and was unable to see how she could continue as a management consultant if she had a family:

... how am I going to fit as a consultant if, in hopefully not too distant future, I'm fortunate enough to have a family? Because I absolutely would like to continue working but ... I can’t even look after a dog now. So how am I supposed to have a family? (June, Senior Consultant, Achieve).

Amy’s father was a consultant and that was a key influence on her choice of career. Amy had experienced him being away most of the time when she was growing up. Amy had not so far been required to work away from home and was not averse to it but was quite clear that she would not want to work away from home when she has children:

My Dad used to be away Monday to Friday and we only used to see him on a Saturday and Sunday morning before he left again so we did not see much of him growing up. ...I don’t think I am quite there for that... (Amy, Senior Consultant, Protect)
Alice feels fortunate that her children are grown up and do not depend on her, so she is able to enjoy the lifestyle and the variety. The only female consultant with young children Alice had encountered was someone who had become an independent Associate so as to have control over where and when she worked. Alice wondered how sustainable her position would be long term:

... she seems to have managed to maintain a contract but that is just with one of the consultancy’s clients. If they lose the business from that client her work will probably dry up unless we have someone else in her local area.

(Alice, Senior Consultant, Achieve)

Harvey did not believe gender was an issue and pointed to the female head of one of the big consultancies as an example of how it could work, and that it always comes back to the support you have:

She’s got four kids.... She lives in London and she works in London so it’s almost like a day job, really. But her husband is a writer, so he works from home a lot, so that helps. But it’s back to the support you’ve got. If you’ve got support at home, then it’s fine. It works both ways, doesn’t it? (Harvey, Director, Achieve)

6.3.3 Experiences of setting firm boundaries

Directors and Senior Managers had reached what they perceived as a level where they had sufficient control and autonomy to be more present at home and even share childcare responsibilities. They felt able to set clear boundaries and vary work patterns to meet the demands of work and personal systems. Management consultants of all levels felt justified in setting firm boundaries between work and personal life at the weekends.
Management consultants from Achieve who were usually away during the week saw giving up ownership of their time during the week as a good trade-off. Those who perceived total commitment to their consultancy during the week sometimes found the transition between work and personal systems very difficult. For some, even though they experienced themselves as detaching from work systems, there was evidence that work still seeped into personal life at the weekends. Experienced management consultants perceived they had worked hard to make the consulting lifestyle work with personal and family systems. Some saw the time they spent away from home as a trade-off for the high levels of compensation in consulting.

Nigel felt that it should not be necessary to work all hours. He had previously worked for a large consultancy where his perception was that the needs of the client always came first. He felt that Perform were far more balanced in their approach to the demands of consultants’ personal and family systems. Nigel now had a young child and shared childcare responsibilities with his wife. Nigel sometimes had to leave early to collect his child when his wife was away and, whereas he may log on later to make up the time, he felt that attitudes have changed, even when it comes to clients:

*I think there’s a lot more flexibility ... but also clients are a lot more open.*

*So here, for example, I sometimes have to pick up my little boy and drop him off because my wife sometimes works away, and they’re fine with that...*

*Maybe I’m just lucky, sometimes I wouldn’t be, but that’s the way it is and that’s what I’ve got to do, there’s no way around it for me.*  (Nigel, Director, Perform)

Geoff had worked hard to reach senior manager level where he felt he could influence where he worked when he and his wife decided to have children:
It has actually worked for me…the projects that I have had in the last four years have all been London based and when my wife is working I can go and collect the kids put them to bed and all that kind of thing and if I need to, I can carry on working in the evening (Geoff, Senior Manager, Protect)

Management consultants from Achieve reported being happy to fully commit to whatever was required during the week if it meant being able to give all their attention to their family and personal life at the weekends. Jack does not see time in the week as his own but draws the line at weekends and sees that as a good trade-off:

you are away Monday to Friday it is not any skin off your nose whether you are finishing at five or finishing at ten. Bluntly, as long as you get enough sleep and you have something to eat it doesn’t really matter…I don’t often see that as my time…the trade-off for that is that I don’t think people should be expected to then pick up stuff between six o clock on a Friday and eight o clock on a Monday. You know, I think that is a reasonable trade-off ...

(Jack, Senior Consultant, Achieve)

Jill usually worked away from home from Monday to Friday. Her perception was that she gave everything to her job during the week and found it difficult to transition between work and home:

as a consultant the day you sign your contract you sign away your soul. You know, you belong to the consultancy all week and you belong to yourself at the weekend. You do not own any part of you anymore because there are expectations ... I am paying for you and you owe me your time. So, you
literally just gift your soul so, I find ... switching off when I get home the

most difficult transition (Jill, Manager, Achieve)

Jill felt protective of her time at the weekend but flexible about doing work early in the
morning before anyone else was around and it would not be noticed. perhaps indicating
some feelings of guilt about using what she saw as time that belonged to her personal life
for work:

Sometimes. I wake up fairly early on a weekend anyway so if I have got stuff
to do, I will just get it out of the way before anybody else is up and about, so
it is not really noticeable (Jill, Manager, Achieve)

In contrast, Patrick felt that he could detach and re-attach between work and personal
systems quite easily. However, even though Patrick believed he was completely
detaching, he was still thinking about work. Although, he perceived he had established
firm boundaries, work demands still seeped into his mind:

When I go home, I have some friends coming on Saturday. I will not be
talking about my job as part of that socialising, it just won’t come into my
mind at all. I won’t talk about work with people when I am not at work it is
quite delineated. It is not that you have not got things you still need to be
thinking about it just does not come into my normal existence away from
work. I can detach and re-attach quite readily (Patrick, Manager)

Bernard is an experienced manager who felt that he and his wife have made the consulting
lifestyle work as a family. Bernard believes that he is well compensated and any job that
paid a comparable amount would bring a lot of different pressures and that although it
might mean he would spend less time away from home it would not necessarily mean that he had more family time:

\[ I \text{ would probably still be working long hours and coming home tired and grumpy. At least I can focus on just doing my work while I am away. And then I won't do anything on weekends unless it is an absolute need. So, I won't answer my phone. I will make sure my expenses are done by the time I am home. And then weekends are just family time (Bernard, Manager, Achieve). } \]

John also saw being away as a trade-off. He felt that he had worked hard to make the consulting lifestyle work over the years and the high levels of compensation in consulting and the lifestyle he was able to provide for his family made up to some extent for the time he spent away:

\[ I \text{ think ... for me one of the big things you know ... you can earn loads of money as a consultant, right? You should be able to have a great family life because you can do all the things you want to do as a family. You know, go to Disney World and all those things. But you have got to be able to make it work. (John, Director, Achieve) } \]

### 6.4 Experiences of making the consulting lifestyle work

In this major theme I present data on management consultants’ experiences of making the consulting lifestyle work. I first present data on how management consultants experienced support from home and the perception of management consultants with family at home that the demands of consulting can only be met with the full support of their partner. I
then present data on experiences of management consultants maintaining physical and mental wellbeing in the face of the demands of the consulting lifestyle.

6.4.1 Experiencing support from home

Management consultants with family at home who were regularly required to work away from home felt that the only they could cope with the demands of consulting was with the full support of their partner. Even with full support, there were times when some perceived the sacrifice of being a consultant was too great and had questioned whether to continue.

Harvey was in no doubt that having support from home was the main factor in making life as a management consultant sustainable:

If you don’t have the right support at home, then you can’t do it...the people who struggle the most, it’s when they can’t make it work with their family effectively (Harvey, Director, Achieve)

Patrick was an experienced management consultant and felt that being able to sustain a career in consultant went beyond having support from partners. His experience was that you have to have a set up at home that supports the lifestyle:

So, you need to have a set-up that allows that, partners that are quite independent and a social life that you can drop back into very quickly and be able to maintain things when you are on the road as well (Patrick, Manager, Achieve)

Bernard found overseas projects most challenging from a family perspective, but he made it work by taking his wife with him:
We decided a couple of years ago. we were definitely going to have kids. My wife gave up work so that she was completely stress-free and, actually, we ended up doing a couple of overseas assignments where she came out with me. And that works really well as well. So ... She was in Nashville with me for three months. And she really liked that, because I was home every night and it was different... (Bernard, Manager, Achieve)

John’s experience was that family have to “sign up”. Even with support from home his experience was that it had not been easy. John reflected that there were times when he felt he had missed out and questioned why he was doing the job:

the advice I give my team is that it is a team game, right? There are no ifs or buts about it, if you want to do this job and you want to have a family life it is a team game, so your partner has got to sign up for this job as well as you.... but that has not been easy, it’s been bloody hard right? And, I remember, there have been some Fridays when I have come home and ... when they were young... hand the baby over to you and the baby doesn’t know who you are, right? It is like giving her to a stranger, bloody difficult that is. And then you question why I am doing this job? ...we have had those moments of being there (John, Director, Achieve)

Others experienced doubt about how long they could sustain being a management consultant. June had recently become engaged, and her focus was on the future. June was finding it difficult to visualise what the next five years in consulting might look like for her personally. June’s personal priorities were changing, and she was unable to visualise how to integrate her life vision with her work vision
... I am thinking about what the next five years look like for me ... maybe I make a choice of whether I want to do so much travelling, I think that is becoming more important for me ... extra money probably isn’t so important (June, Senior Consultant, Achieve)

6.4.2 Experiencing ways of maintaining wellbeing

Management consultants were experiencing an increasing awareness of the importance of physical and mental wellbeing as a way of making a career in consulting sustainable. For some this involved living in a rented flat rather than a hotel to have a more normal life when they were away, taking exercise or finding flexible ways of working with the support of the client that introduced a balance between working away and working at home during the week.

As an experienced manager Patrick had experienced management consultants coping with being away from home in different ways, Patrick felt responsible for the wellbeing of his team, particularly the more junior, less experienced members

...when you are working away from home, particularly with the junior ones, I am very much minded to say look, you really should not be locking yourself away in the evenings. If you need time to yourself that’s great, go and do stuff but don’t be locked up in a hotel room with things going around in your head. Go and get some exercise, go and do something different.

(Patrick, Manager, Achieve)

Jack’s experiences hotels as soulless. When he is on a project that is expected to last for more than a few weeks he rents a flat so that he can experience what he feels is a more normal life:
it is my space for the time I have got it. I have got access to it at the weekend, and I can leave stuff there I don’t have to move everything around with me. So, a hotel yes, you can do that for a little while but it gets pretty soulless … I like being able to sit somewhere that is not the bed and I like being able to do food for myself and I like simple food and that sort of thing. I wouldn’t do that for a piece of work that was just a couple of weeks or whatever but if it is at least a month then definitely (Jack, Senior Consultant, Achieve)

As an experienced management consultant Nigel had experienced the strains and stresses of being away from home. He was proud of his consultancy and the importance they attached to wellbeing and their policy of trying not to send management consultants away on consecutive projects:

we don’t have many projects that are away, we have some, don’t get me wrong but I think we’re also pretty good when someone has been away, we are conscious that actually we can’t send them out again. (Nigel, Director, Perform)

Walter feels exercise is important for wellbeing. He takes his equipment with him and always knows where local centres are. He feels it is important to put the effort in:

I put my bike in the back of my car, I bought a turbo trainer to set up in the hotel, and I just indoor cycle in my room… I know where the closest swimming pools are. I’ve got my bike with me, and my turbo trainer with me, so I know what to do. And I know the running routes. And if not, I know
where the gyms are where there are treadmills, right? (Walter, Senior Consultant, Achieve)

Management consultants also found flexible ways of working as a way of maintaining wellbeing whilst coping with the demands of consulting. Many consultants found working from home on Fridays helped to provide some work-life balance. Simon usually worked from base on Fridays but found that when he was working away from home this was sometimes to the detriment of his energy levels and opted to work from home, even at the expense of visibility:

I might say... I’m going to just work from home on a Friday. Because, I’ve got a whole bunch of washing to do. And you’ve got to be a bit selfish ... it’s important to have time with people within the firm, but I just think you can sometimes pay too much attention to that, to the detriment of your own energy levels. Because you just need to keep your energy levels up and you don’t want to get to Saturday just being completely wiped. (Simon, Manager, Perform)

Alice felt that being at home on Fridays and waking up in her own bed one extra morning each week made a huge difference to her work-life balance. She wished the consultancy would adopt the three-four-five model as policy (three nights in a hotel, four days on client site, five days billing):

it does depend on the client and the contract and the type of work that you are doing. It would be nice if the consultancy insisted that we followed that model all the time but obviously it can’t always work. It makes a huge difference being away only three nights a week as opposed to four... just
that feeling waking up in your own bed four mornings each week rather than three (Alice, Senior Consultant, Achieve)

Bernard was generally away four or five days each week but had occasionally been lucky that he has had some projects where he can do part of it remotely:

*I have been lucky that I have had projects where I have been able to do chunks of it remotely and therefore be working from home. So, you know, two or three days a week. Again, they are the real outliers. Generally, I’m away four or five days a week. (Bernard, Manager, Achieve)*

### 6.5 Chapter conclusion

Management consultants experienced a sense of loss and sacrifice when they worked away from home. They were separated from their personal system and missed time with family and social life. Others welcomed the opportunity to travel and gain life experience or the lack of distraction, Graduate recruits felt anxious at the prospect of being away on a client engagement, seeing it as a skill they must learn. Travel is a feature of management consulting and some experienced this as isolating, frustrating and emotionally draining. Others embraced the journey as a time to work or relax, or to consciously decompress and transition between work and personal systems,

Directors and Senior Managers perceived they had some control over where and when they worked. More junior management consultants felt they had very little control over where and when they worked, and that utilisation targets took priority over their own preferences. Directors and Senior Managers perceived they were able to set firm boundaries that allowed them to share childcare responsibilities and construct a work-life balance they perceived worked for them. In contrast, female consultants at lower grades
perceived having children as a barrier to a long-term career in consulting. Consultants of all grades felt justified in setting firm boundaries between work and personal systems at the weekend. They saw this as a trade-off against the long hours and being away during the week. Nevertheless, there was evidence of the demands of work systems seeping into personal systems. Management consultants also saw the demands of the consultancy lifestyle as a trade-off against the high levels of compensation in consulting.

Experienced management consultants perceived having support and a stable structure at home that could operate during their absence was a pre-requisite for making the consulting lifestyle sustainable long term. Management consultants were experiencing increasing awareness that physical and mental wellbeing were important for a sustainable career in consulting. They perceived they could achieve this through exercise, being active rather than spending evenings in a hotel room and gaining the support of the client and their consultancy for flexible ways of working.
7 Discussion

7.1 Chapter Introduction

In the previous three chapters I presented findings relating to the superordinate themes emerging from my research. In this chapter I use conceptions of liminality to interpret the findings of my research and compare these with extant management consultancy theory, and theory from other relevant domains, drawing out where the findings support or extend existing theory and where they offer a different perspective. The stated aim of the research, and the context for this discussion chapter, is to understand how management consultants experience and navigate between the competing demands of their consultancy, client, and personal systems of engagement and how conceptions of liminality can illuminate this.

The research suggests the overarching kind of liminality experienced by management consultants is multiple belonging to their different systems of engagement. I interpret multiple belonging as a recurring kind of liminality that is so frequent as to at times appear permanent. I therefore begin the chapter by discussing multiple belonging in the context of the competing demands and varying degrees of incorporation experienced by management consultants in relation to each system of engagement. I continue by discussing how management consultants experience different forms of communitas (Turner, 1969) as a means of coping with multiple belonging. The research suggests that management consultants experience three specific forms of communitas. I first discuss the communitas of the consultancy team on client site, I continue by discussing the sense of belonging management consultants gain from informal consultancy networks. I then discuss the communitas of liminal pairing between the management consultant and their
key client, and how this differs from client consultant relationships so far described in the literature.

In the next sections of the chapter, I first discuss how management consultants experience shorter term liminal transitions within the overall picture of multiple belonging as they navigate between competing systems of engagement, and the associated triggers. I then discuss management consultants’ experiences of these shorter-term liminal transitions when navigating between competing systems of engagement. For this part of the discussion, I use the themes emerging from the analysis of the data in Chapter 3 Methodology and also used to structure the three findings’ chapters. First, I discuss navigating engagement with the client followed by navigating between the client and consultancy and finally between work and personal systems of engagement.

I conclude the chapter by presenting a conceptualisation of the different kinds of liminality experienced by management consultants and relate these liminal experiences to the central research question discussing the differences between consulting settings.

7.2 Multiple belonging

The research suggests that management consultants spend much of their time between competing systems of engagement. They experience multiple belonging and varying degrees of incorporation with each system of engagement. In Figure 7-1 below I show the competing demands and sense of belonging associated with each of the three systems of engagement:
Figure 7-1: Competing Systems of Engagement

Management consultants identify with and experience a sense of belonging to their consultancy. However, the pressure they experience to maximise their utilisation on client engagements and develop skills is such that when they are within their consultancy system their main focus is on finding the next client engagement. So, whilst they experience a sense of belonging and want to be visible within their consultancy system, they perceive that belonging also means being eager to contribute to a sequence of client systems.

Line management in the traditional sense does not exist within management consultancies. Management consultants belong to multiple teams and have multiple managers across practice and sector teams, internal and client-facing projects and their Career and Account Managers. Being liminal does not depend on working across organisational boundaries and, as in the study of management groups within
organisations by Swan, Scarbrough and Ziebro (2016), management consultants are liminal within the consultancy system.

Management consultants’ sense of belonging and attachment to their personal system of engagement depends on their home situation. Those with family and social ties may experience a strong attachment and a sense of loss and even frustration when they are away from home in the sense of extended overnight stays. In contrast, consultants who do not have strong family and social ties are less intensively attached and able to embrace being away from home as an opportunity.

When engaging with client systems, having separated from their consultancy or personal systems of engagement, management consultants do not re-aggregate with the client organisation, that would infer more permanent employment. Instead, they enter a rather ambiguous state, suspended between their consultancy and client systems. There are some parallels between management consultants engaging with client systems and overnight prison visitors in the study by Moran, (2013) who do not re-aggregate with the prison system, but return instead to their pre-liminal state. However, for management consultants their pre-liminal state is unclear as they are liminal within their consultancy system and their incorporation within it is fluid and fragmented.

The anthropological interpretation of liminal transition is a three stage process starting with rites of separation from one stable state, liminal rites of passage where the liminar crosses a threshold between two stable states and rites of re-aggregation with a second stable state (Turner, 1967, 1969; Szakolczai, 2009; Van Gennep et al., 2019). Given the complex picture of multiple belonging, fluid management and fragmented incorporation within the consultancy system, it is difficult to argue that management consultants experience rites of separation when navigating between competing systems. They may
still experience some aspects of rites of separation when they engage with client systems, being cast into the unfamiliar territory of the client engagement and having to fend for themselves away from the formal support of their consultancy.

The extent to which management consultants experience rites of separation appears to depend on their situation. A management consultant moving from engagement to engagement for the same central government client but with a different team, client sponsor and subject matter, still experiences separation and liminality but the transition is far less unsettling than for example, the experiences of graduate new joiners and the feeling of, “being thrown in at the deep end to float, swim, not swim” (Geoff, Senior Manager, Perform).

In summary, the research suggests that management consultants experience multiple belonging as a recurring kind of liminality that may at times appear permanent, both within their consultancy system and to their client and personal systems of engagement. Management consultants do at times re-aggregate with their consultancy and personal systems of engagement, at least in a partial sense, taking up foreground membership but with other systems still in the background. This is different from the way the term liminality is used in the classic liminality literature (Turner, 1967, 1969; Van Gennep et al., 2019). I return later in this chapter to discuss the nature of liminal transitions that occur within this overall picture of multiple belonging.

7.3 Experiencing different forms of communitas

In this section I discuss how management consultants experience what Turner (1969) defines as communitas or anti-structure as a means of coping with multiple belonging. In the context of multiple belonging, communitas takes some specific forms and plays an
important role in helping management consultants cope with their liminal position. The research suggests that management consultants use the communitas of their consultancy team on client site and informal consultancy networks to gain a sense of belonging and identity as a consultant. The research also suggests that management consultants experience themselves as making productive use of liminality by developing a collaborative relationship with their primary client. This is a particular form of communitas which I interpret as a liminal pairing, a dyadic relationship based on mutual trust, a common vision of the approach, scope and outcomes of the engagement, and where client and consultant experience an accountability to each other that goes beyond the terms of any contractual agreement.

I begin by discussing the communitas of the consultancy team on client site, I continue by discussing the sense of belonging management consultants gain from informal consultancy networks. Finally, I discuss the communitas of liminal pairing between the management consultant and their key client, and how this differs from client consultant relationships so far described in the literature. I depict these different forms of communitas in the context of multiple belonging in Figure 7-2 below:
7.3.1 Communitas of the consultancy team on client site

Management consultants on client site sometimes feel marginalised in the sense that they are not fully fledged employees of the client organisation. There are some client activities where they are included and others from which they are excluded. There are similarities to Buechner et al., (2020) who found that transformative liminal experiences create a shared sense of marginality amongst displaced workers. Although it cannot be argued that management consultants are in a transformative state in the sense that they do not re-aggregate with the client organisation, they nevertheless experience a similarly intense solidarity and togetherness.

Management consultants on client site are liminal, suspended between their consultancy and the client organisation. They may also be away from home, suspended between home life and work life. They experience their consultancy team as a team within the broader
client-consultancy team, a safe place where they can discuss issues away from the client and feel supported. Management consultants form a strong bond that feels to them like family, a bond that is temporarily more intense when working as part of a team away from home, travelling, working, eating, and even going to the gym together. There are similarities with Vesala and Tuomivaara (2018) who claim that the temporary nature of the environment and the new configurations of workmates heightens the intensity of the liminal experience.

The communitas of the consultancy team within a team on client site draws on the often collective nature of liminality. Turner (1969) defines communitas as a close, egalitarian and familial community, a sense of other that exists as an anti-structure, alongside formal structures. He claims that communitas temporarily liberates humans from the limiting ties of social structure. In contrast, whilst management consultants experience their consultancy team within the broader client-consultancy team a close familial community, the hierarchy of the consultancy team is maintained.

The functioning of this client-based consultancy team has characteristics both of an anti-structure and of having its own rules and hierarchies. It is an interesting variation which corresponds more closely with Edith Turner (2012) who argues that communitas is the very basis for organizing and working together and that organizational habits, structures, and rules of behaviour do eventually develop and work well if they remain on the human level. She does however describe the fine line between communitas which is usually a spontaneous feeling of camaraderie, and false communitas which is forced, often hierarchical and lacking the experience of connectedness of naturally occurring communitas. Although the hierarchy of the consultancy team within a team on client site is maintained, management consultants feel safe, supported, and connected, rather than any suggestion of feeling forced.
The communitas of the consultancy team on client site is not always a positive experience for management consultants and may not always be perceived as a safe place. Others within the communitas may feel threatened and retreat into self-preservation rather than providing support. For example, Rula, on a project with her previous consultancy where she felt abandoned by the formal structures of her consultancy and experienced a lack of support from the informal structure of her consultancy team on client site in the face of what she perceived as personal abuse and harassment from the client. Rula perceived colleagues themselves were under so much pressure she feared they would “throw her under the bus” with the client. For management consultants who are liminal on client site and perceive a lack of support from formal and informal structures, liminality may become a deeply unpleasant and destructive experience where they feel unsafe and abandoned. This suggests that, in contrast to the communitas described by Turner, (1967, 1969), the informal organisation between liminal consultants on a client site can function, not as a supportive communitas, but as something more individualistic and non-supportive.

Management consultants working away from home are sometimes expected to continue working in the hotel in the evenings to resolve issues, Toraldo, Islam and Mangia (2019) claim that managers may use communitas to exercise control over or even exploit team members by reframing work as communitas and using rhetoric such as togetherness and solidarity to increase productivity. However, now leading a client engagement with Perform, Rula was keen to resolve issues with the client engagement away from the client. Given the tendency of management consultants to work long hours when they are away from home, she assumed the team were happy to work in the evening in the hotel and experienced the help of the team as useful. Although Rula did not consciously set out to use communitas to exercise control or exploit the team, this further demonstrates the
complexity of having a team structure that can co-exist with communitas, but where there may be limits to this where at times there may be tension between the structure and hierarchy of a consultancy team and the anti-structure of communitas.

7.3.2 Informal networks

Management consultants at all levels of seniority rely on informal networks with peers and mentors within the consultancy for support and a sense of belonging and identity. However, communitas depends on spontaneity and an absence of formal structure and controls. The graduate network in Protect was well established and supported by formal structures to the extent that participation seemed to be expected. Graduate consultants gain a sense of belonging and support from the anti-structure of the graduate community and the graduate network operates effectively as a communitas (Turner, 1969). This suggests that informal structures that support consultants in their various aspects of liminal experience can also be in some way formalised, and communitas can to a degree be recognised and catered for by the formal organisation. However, according to Meira (2014), communitas is structurally integrated by exclusion and liminal organization is conducted by contradiction to the formal system. When these contradictions begin to be eradicated, communitas evolves and is eventually replaced by formal structures. It could be argued that the graduate community is at risk of becoming too integrated into the formal consultancy system and may as a result become less effective as an informal support mechanism.

Achieve facilitate networking between consultants by publishing geographical locations to encourage consultants to meet up and for Managers to provide pastoral care for less experienced consultants who may be struggling. Achieve did not put a structure in place for this activity and there was no compulsion for management consultants to meet up or
provide support for others. Achieve, in leaving this space between the information they provided and management consultants acting on it, is allowing communitas to spontaneously happen. This therefore supports rather than detracts from the anti-structural nature of the network and avoids becoming a false communitas (Turner 2012).

Management consultants leverage the communitas of informal consultancy networks to gain a sense of belonging and sustain their professional identity as a consultant (Reed and Thomas, 2019). However, they have little control over the length of the client engagement, or its location and the remote geographical location of some client engagements makes networking difficult. Beech (2011) claims that when there is liminality but the means to reach aggregation is not in evidence the natural stress of the liminal situation is heightened. However, the research suggests that, in situations where management consultants experience prolonged periods of separation from their consultancy and an absence of communitas, they experience feelings of isolation, detachment and loss of identity and perspective as a consultant.

In contrast, graduate entrants at Protect joining a large government project immediately following induction, perceive they have no need for additional support. The long-term nature of the central government project and level of detachment from the consultancy gave rise to concern by more experienced consultants that their inexperienced colleagues had “gone native”. I interpret this as graduate entrants developing liminoid identities, a liminal condition where the consultant identifies more with the client and the client engagement than with their consultancy. However, unlike those in ambiguous work situations in the study by Daskalaki and Simosi (2018) who found the liminoid nature of the situation had a destabilizing effect on their personal and professional identities, graduate entrants were able to derive their professional identity as a consultant from the
large project environment, which in effect had formed a liminal subset of the consultancy (Turner, 1969).

7.3.3 Liminal Pairing

The final form of communitas experienced by management consultants is liminal pairing. An important pattern emerging from the research is that management consultants aspire to become their client’s “trusted advisor” where the client trusts them to do whatever is necessary to achieve successful delivery. Once the client comes to regard the consultant as a trusted advisor the relationship becomes less formal, and a productive liminal relationship may then develop.

Liminal pairing is an important mechanism by which management consultants experience trust and the feeling that there is an understanding of the scope, approach and expected outcomes of the client engagement that is shared by the client. This becomes enacted within a dyadic relationship, where both parties signal informally that they are going to support each other beyond the terms of the formal engagement. The consultant and the client are embedded in different systems of engagement, but they are able to combine their knowledge and resources to implement change that will be seen as valuable within each system. They experience accountability to each other that is quite separate from the accountability they feel to their formal systems. Jill sensed her relationship with the client was valued when the breadth of the conversation began to span beyond the scope of the engagement:

*So, the client would say “can I ask your opinion?” ... or “I need to get this off my chest, can I talk to you about it?” ... that is when you start to realise that your working relationship, your professional relationship, your*
boundaries have crept a bit and it is not just about what you are doing to deliver and help them in that capacity, they want you to help balance their life and manage their worry beads and that is quite nice actually… (Jill, Manager, Achieve)

In the literature review chapter, I examined the nature of the trust between consultant and client. In developing a trusting relationship with the client by making their client look good management consultants are demonstrating benevolence trust, defined by Sankowska and Söderlund (2015) as trustworthiness, care and honesty between knowledge providers and recipients. There are similarities to Ko (2010) who found that benevolence trust based on the emotional bond between client and consultant is critical to project success whereas trust based on the competence of the consultant is not, as demonstrated in Anna’s relationship with her client who asked her to just “fix it” even though he knew it was not part of her skillset. Mayer et al. (1995) define trust as the willingness to be vulnerable to the actions of others, even though the trustor has no control. I interpret liminal pairing as reducing the client’s perceived vulnerability and uncertainty making the remaining levels of uncertainty and vulnerability acceptable. This enables trust granting on the part of the client in what Nikolova, Möllering and Reihlen (2015) define as a leap of faith.

There is also a power aspect to liminal pairing where the consultant is able to leverage power and authority from the relationship with the client and also gain influence and access to networks within the client organisation where they are able to provide further support to their key client. Bernard observed that “without a client sponsor you have no authority”. John was prepared to suspend his own judgement and comply with the client’s request to remove a consultant from the project to preserve the relationship with the client,
recognising that without the backing of the key client, his source of power and authority and therefore the success of the client engagement would be adversely affected.

In Figure 7-3 below I compare liminal pairing with other dyadic client-consultant relationships described in the literature:

![Diagram of Features of Liminal Pairing]

In (A) above I summarise all the features of liminal pairing already discussed in this chapter. The combination of features and the willingness of client and consultant to support each other beyond formal systems differentiates liminal pairing and illuminates a much stronger relationship between client and consultant than any liminal or other client-consultant collaboration so far described in the literature.

**Figure 7-3: Comparing aspects of liminal pairing**

In (B) Nikoleva and Mollering (2015) “Trust granting as a leap of faith”

In (C) Carmińska and Mazza (2005) “Allies of management in temporary positions of power”

In (D) Sturdy and Wright (2011) Leverage clients “credibility across boundary spanning networks”
The client-consultant relationship described by Nikolova, Möllering and Reihlen (2015) in (B) recognises that the client-consultant relationship required for success is that of the consultant as trusted advisor. However, they focus on the consultant signalling ability rather than any emphasis on combining knowledge, and building trust. They claim an emotional connection by meeting the needs of the client, rather than the development of a common vision of project approach scope and benefits with the client.

There are parallels with Czarniawska and Mazza (2003: 267) in (C) who refer to the liminality of the client-consultant relationship as a liminal space and management consultants as “allies of management, in temporary positions of power where usual practice and order are suspended and replaced by new rites and rituals”. Although their focus is on productive use of liminality and leveraging the power and influence of the client, there is no emotional connection and no real collaboration. They claim consultants felt they were there to take the blame for anything that went wrong.

The client-consultant relationship described by Sturdy and Wright (2011) in (D) claims a productive client-consultant relationships may result where the client has credibility across internal boundary-spanning networks. However, the relationship is functional and lacks an emotional connection. Neither the relationship described by Nikolova, Möllering and Reihlen (2015) nor Sturdy and Wright (2011) claim productive use of liminal communitas. Other than liminal pairing, none of the relationships described indicate a willingness on the part of clients and consultants to support each other beyond the terms of the contractual agreement.

My research suggests liminal pairings are impossible to form when the key client and consultant do not agree on the scope, approach or expected outcomes of the engagement or the client fails to recognise the relevance or value the consultant can offer, for example
when they feel undermined or threatened. In these situations, the management consultant perceives that it is difficult to engage and feels marginalised and undervalued. They then experience liminality as destructive or even toxic, where they are unable to contribute. Liminal pairings are difficult to form when the consultant perceives there is a lack of trust because the client feels threatened or suspicious and experiences the client as finding it difficult to come to terms with change. When this occurs, the definition of trust proposed by Mayer et al. (1995) suggests that the client’s high level of uncertainty and perceived vulnerability is incompatible with forming a liminal pairing.

There are related situations where liminal pairings are impossible to form. This may occur when management consultants experience themselves as being perceived by the client as a threat or unable to advance their views. For example, Alistair’s experience of being pressured by the client to cover up the severity of problems he perceived were the result of the solution procured being unsuitable for the planned application. Management consultants who feel they are perceived by the client as a threat and unable to advance their views experience themselves as being trapped in negative liminality where the client is displaying what Thomassen (2014) defines as trickster like behaviour, taking over and, in Alistair’s case, depriving him of his role as master of ceremonies in the liminal transition where he would usually work in a liminal pairing with the client orchestrating re-aggregation with the results of transformational organizational change. However, whereas Szakolczai (2009) describes tricksters as emotionless figures, maintaining liminality so as to gain influence under conditions of confusion and distress, Alistair’s perception when he reflected sometime later was that the client’s behaviour was the result of him experiencing emotions such as fear of being held accountable for the failure of the project.
7.4 Navigating between competing systems of engagement

Whilst experiencing the liminality of multiple belonging to their three systems of engagement, management consultants also experience shorter term, multi-directional liminal transitions as they navigate back and forth between the competing demands of the different systems. There are very few situations where management consultants experience liminality that corresponds with the anthropological interpretation as a linear three stage process where the liminar crosses a threshold between separating from one stable system and re-aggregating with another (Van Gennep et al., 2019). The research suggests that full re-aggregation rarely occurs for management consultants.

There are some similarities with the study of inter-organizational supply chain managers by Ellis and Ybema (2010) who propose that those who work between organizations are in a state of permanent liminality. A key difference illuminated by the research is that management consultants experience multiple layers of liminality whilst also experiencing multiple belonging. So, rather than permanent liminality management consultants experience a perpetual kind of liminality associated with multiple belonging between systems of engagement whilst at the same time experiencing shorter term liminal transitions.

In Figure 7-4 below, in the context of multiple belonging and different forms of communitas used by management consultants to cope with the liminality of multiple belonging, I present an overview of the shorter-term liminal transitions management consultants experience when navigating between their competing systems of engagement:
When engaging with the client system management consultants experience liminal transition between not knowing and knowing about the client and the client organisation. They leverage their outsider status and expertise whilst at times being regarded as an insider. They develop a client-facing persona they perceive meets the expectations of the client. At the same time management consultants experience the pressure of the performance expectations of their consultancy and the requirement for them to make an internal contribution and remain visible within their consultancy system to secure the best roles, develop skills and progress. They transition back and forth between the client and consultancy systems engaging with multiple internal teams and networks. Management consultants also belong to their personal system and find ways of establishing firm boundaries between work and personal systems to achieve a work life balance that works for them. Some use the liminality of travel to separate from work systems and re-aggregate with personal systems of engagement.
Management consultants experience different types of triggers for liminal transition. These are defined in the literature as compulsory, and voluntary triggers (Söderlund and Borg, 2017) and staged or spontaneous triggers (Stenner, 2017). In Figure 7-5 below I show these triggers alongside how the definitions relate to management consultants and examples of how the different triggers manifest themselves in the research:

![Figure 7-5: Liminal Triggers](image-url)

In the following sections I discuss the mechanisms management consultants use to transition between competing systems. I first discuss liminal transitions experienced by management consultants when engaging with the client, I then discuss liminal transitions between client and consultancy systems. Finally, I discuss liminal transitions between work and personal systems of engagement.

### 7.5 Navigating engagement with the client

As shown in Figure 7-4, when engaging with the client on a new client engagement, management consultants must transition between not knowing and knowing the client and the client organisation, leverage their outsider status whilst developing a relationship with
the client where they are at times regarded as an insider and construct a client-facing persona that they perceive meets the client’s expectations. These are elements of liminal transition experienced by management consultants which they perceive, if successfully executed, will result in being able to develop a collaborative and productive relationship with the client in a liminal pairing.

7.5.1 Liminal transition between not knowing and knowing

Liminal transition for management consultants engaged in day-to-day delivery is triggered when they are assigned to a new client engagement. This is a compulsory trigger that usually involves management consultants adapting to a new environment on a client site. (Söderlund and Borg, 2017). Management consultants may have very little knowledge of the client or the client organisation and sometimes only scant knowledge of the scope and objectives of the engagement and the proposed solution. They feel they are in a weak position. Their perception is that the client expects them to have all the answers because that is what they are paying for, whilst what the consultant is often experiencing is doubt and uncertainty. Management consultants are conscious of what they perceive as high day rates paid by the client and the time pressured nature of the client engagement. They understand that they must manage the ambiguity of their situation and quickly demonstrate value and relevance to the client.

As in the study by Bourgoin and Harvey (2018: 1621) management consultants experience “learning–credibility tension” and employ tactics to gain credibility with the client such as Simon (Manager, Perform) always producing something early in the engagement to “earn his stripes” and gain the client’s trust. Also similar to the findings of Bourgoin and Harvey (2018) complex projects come with greater risk of exposure during interactions with the client and, although they have to learn on the job, if they
reveal this too much to the client, they risk losing credibility. Neville discovered this when
the client lost confidence because they perceived his team were asking the wrong
questions.

In the literature review chapter, in the absence of literature on liminality relating to
management consultants’ initial engagement with the client, I identified some similarities
with that of Business and Management undergraduates understanding threshold concepts
that lead to a deeper understanding in the study by Hawkins and Edwards (2015).
However, when engaging with client systems, the experience for management consultants
transitioning between not knowing and knowing varies according to how skilled they are
at coping with ambiguity of a new client engagement. The research suggests that more
experienced consultants become skilled at operating in ambiguous circumstances and
making what they perceive as valuable inputs despite not knowing very much about the
client or the client organisation. They experience the transition between not knowing and
knowing enough and being able to assimilate this with their existing knowledge, as more
routine and less emotionally fraught than their less experienced colleagues.

All this suggests that management consultants develop a liminal competence of
transitioning from not knowing to knowing enough to meet the requirements of the client
engagement at a rapid pace. They do this by relying on what they refer to as core
consulting skills, structured ways of working such as running cross functional workshops
with client staff, interviews and meetings with key client stakeholders, all aimed at
gaining buy in from operational staff, sponsorship from key stakeholders and as much
knowledge from clients at all levels as quickly as possible. They see themselves as then
being able to combine this knowledge with their own experience and knowledge of the
proposed solution to make progress. Directors responsible for the ongoing relationship
with the client feel they have a different set of issues to navigate. They perceive themselves as being of most value in the liminal position of helpful outsider. They are usually involved in forming the initial strategy and high-level scope of the engagement with senior clients and are then somewhat removed from day-to-day delivery. Unlike those more closely involved with day-to-day delivery, they do not experience the need to transition between not knowing and knowing the client and the client organisation.

As in the study by Irving, Wright and Hibbert (2019) it is apparently often the negative rather than positive emotions that facilitate management consultants’ entry into and progression through liminal transition. These negative emotions are felt more intensely by more junior consultants who may feel anxious and experience feelings of being “thrown in at the deep end”. Inexperienced consultants may still also be learning to cope with being betwixt and between the client system and a consultancy system of which they know very little. As well as the emotional pressure of doubt, uncertainty and feelings of being in a weak position identified in Irving, Wright and Hibbert (2019), management consultants are motivated by the pressure of what they perceive as the high fees paid by clients and the time limited nature of client engagements. As identified in Alvesson and Robertson (2006) and Gill (2015) management consultants experience further pressure from the high standards and levels of client satisfaction expected by their consultancy, even if it means working long hours on client site.

Similar to the part-time doctoral students dealing with threshold concepts in the study by Hay and Samra-Fredericks (2016) management consultants draw on past experience and gain support and knowledge from others in the liminal space such as the client-consultancy team around them on client site, or bracketing by setting aside other obligations and working longer hours. In their efforts to gain knowledge management
consultants also transition back and forth between their consultancy and the client in a non-linear kind of liminality, seeking advice from their engagement lead if they are more junior or if they are the engagement lead, they might seek advice from the consultancy Director with overall responsibility for the engagement, the account manager or their career manager. In contrast to the part-time doctoral students in Hay and Samra-Fredericks (2016) who found learning more difficult because they were never fully separated from previous ways of being, management consultants become accustomed to operating “betwixt and between” their consultancy and client systems whilst also experiencing a more temporal ‘betwixt and between’ not knowing significant aspects about the client and the client organisation and knowing enough to provide what they feel will be perceived by the client as valuable inputs, and achieve the high standards they perceive are expected by their consultancy and the client.

The research suggests that management consultants may become stuck during liminal transition between not knowing and knowing. Irving, Wright and Hibbert (2019) found that business and management undergraduates became stuck because of emotions such as panic or lack of focus. In contrast, management consultants become stuck when they experience clients having a different understanding of the approach, scope and expected outcomes of the engagement to their own understanding. The research suggests that this may occur when management consultants perceive the client’s idea of the scope is quite vague, or the client feels threatened and does not fully engage. This frustrates the process of combining management consultants’ outsider perspective and expertise with clients’ knowledge and experience and may result in the client and consultant becoming stuck in an unproductive kind of liminality, unable to make progress. The experience of being stuck in unproductive liminality for management consultants is that the pressure of time limits and perception of high daily fees intensifies and, if allowed to continue, may be
damaging to the engagement, the client-consultant relationship and potentially the mental health of the consultant.

### 7.5.2 Navigating inside-outside status

As in the study by Fenwick, (2007) management consultants find clients’ views may be obscured because they are so immersed in the detail. Management consultants perceive they can help to relieve this by bringing their outsider knowledge and perspective. In contrast Sturdy et al. (2009) argue that outsider status and cognitive distance overestimates the novelty of the knowledge consultants bring. The research suggests that during their liminal transition between not-knowing and knowing, management consultants who are sufficiently confident in their consulting skills and experience are able to leverage their outsider perspective and make inputs despite not knowing very much about the client or the client organisation. For example, Jack (Senior Consultant, Achieve) experiencing himself as being liminal “betwixt and between” the knowledge he has as a management consultant about how to improve operational processes, and the knowledge the client has about how those processes work and the broader implications of changing them. Jack is an organisational outsider, able to benefit from cognitive distance and liminality. In “putting the pieces in front of the client” Jack is drawing the client into the liminality he is experiencing, bringing with them their broader knowledge. Jack then sees himself as being able to orchestrate the organizational change, collaboratively, with the client. So being liminal in terms of offering different cognitive frameworks may also depend on having a certain quality of belonging to the client system.

Jack’s experience is in contrast to Sturdy et al. (2009) who see management consultants as making judgements about whether to present themselves as more fixed as outsiders or insiders. However, the research suggests that insider and outsider status is far less
polarised and being seen as an insider may be an advantage when introducing outsider knowledge. The research suggests that management consultants are at their most powerful when collaborating with their key client in a liminal pairing where they are regarded as inside-outsiders a liminal condition where the management consultant has made the transition to a dual status where their outsider expertise is valued and accepted by the client whilst they are also regarded as an insider.

This suggests that being liminal as a management consultant seems to be experienced as developing an awareness of how to work with multiple layers of positioning in a more spontaneous and fluid way rather than consciously crossing liminal boundaries between client and consultancy systems. As with (Borg and Söderlund, 2015) management consultants embrace their inside-outsider status and experience being an outsider or insider as fluid within the client-consultant relationship. Liminal triggers are initially voluntary as they transition between the two, leveraging cognitive distance to introduce new knowledge whilst having a close working relationship and sometimes personal ties. As the relationship with the client develops the transition between being an outsider and insider becomes more spontaneous. Management consultants see the close and trusting working relationship with the client as the basis for offering a different and independent view of what is going on and needs to happen.

The research suggests some similarities with Iszatt-White and Lenney (2020) who argue that management consultants are able to leverage their liminal position and temporary position of power with their client through an ongoing performance where they variably position themselves as insiders or outsiders to manipulate the client to their point of view. For example, it could be argued that Protect consultants working with their Central Government client and choosing to adopt diplomatic language with “everything being
said nicely” are engaging in an ongoing performance. However, this was more to do with meeting the preferences and expectations of the client rather than any attempt to leverage power or manipulate the client. As a Director with overall responsibility for the engagement and future business development, Nigel (Director, Perform) is able to leverage cognitive distance to provide strategic input whilst developing personal ties and an ongoing collaborative relationship with the client as a source of support for future business needs. Similarly, consultants from Protect are able to leverage cognitive distance to push back on hierarchical structures of their Central Government client and bring the novelty of pragmatic decision making and delivery focus, whilst at the same time engaging in social activities with the client.

7.5.3 Developing a client-facing persona

When engaging with client systems management consultants adapt their professional persona to meet what they perceive as their client’s preferences and expectations. Similar to Reed and Thomas (2019) in their study of Public Relations professionals, management consultants continually develop new personas in relation to their social situation. In contrast, Chen and Reay (2020) claim in a somewhat different context of identity re-construction, that individuals undergoing enforced job redesign parked their professional identity and constructed a new professional identity to meet the needs of their new professional work. However, in contrast, management consultants’ construction of their client-facing liminal persona is somewhat short-term and superficial without necessarily transforming their sense of self. They perceive pressure from the client and their consultancy to meet and even exceed client expectations and they are motivated to play their part in successful delivery. Management consultants construct a liminal client-facing persona they perceive will facilitate the development of a productive relationship with the
client. They learn to present a revised persona to the client for the duration of the engagement as a recurrent phenomenon for each client engagement rather than a more permanent construction.

For example, Harvey (Director, Achieve) talks about being a chameleon because “you’ve got to adapt your personality to the circumstance, whilst being yourself from an integrity perspective”. June (Senior Consultant, Achieve) resists the temptation to have pink hair because it would set the wrong expectation with the client and sees herself as wearing a costume and dialling up or down her personality depending on who she is with. At the simplest level constructing a client facing persona may involve more or less formal meetings and communication or adjusting the length and depth of a report. At the more complex level management consultants may need to adjust their approach and behaviours, especially with senior clients, if they want their views to be accepted and acted on. The liminal trigger in this context is voluntary but transition is essential if the management consultant is to form a productive relationship with the client. Management consultants also seek to minimise what they perceive as aspects such as lifestyle that may set them apart. They are aware that they are often well remunerated compared to their client counterparts and there are times when they avoid discussing aspects of their private life where they perceive it would set them apart from clients with whom they wish to develop a productive relationship.

There are similarities but also differences to Ellis and Ybema (2010: 301) who found that supply chain managers who are liminal between multiple inter-organizational relationships, discursively position themselves, colleagues and suppliers as inside or outside their organisation in “shifting circles of identification”, whilst constructing a more permanent liminal identity to preserve their own organizational and professional status.
within those relationships. A key difference appears to be that whereas the liminal identity constructed by supply-chain managers is to preserve their professional sense of self, the short-term persona management consultants experience themselves as constructing is to meet the expectations of their client and help to build trust.

7.6 Navigating between client and consultancy systems

Management consultants must cope with the continuous pressure of the performance and career development expectations of their consultancy. This includes the requirement to make an internal contribution to the ongoing success of their consultancy and be visible within the consultancy to ensure they secure roles that will enable them to develop skills and progress. In this section I discuss how management consultants engage with the consultancy system whilst also engaging with the various forms of liminality described above in the context of the client system.

7.6.1 Navigating competing client and consultancy demands

In contrast to existing literature which focuses on the functions of the consultancy-facing role of the management consultant rather than how, where and when these functions are performed (Haas and Hansen, 2005; Alvesson and Kärreman, 2007; Richter, Dickmann and Graubner, 2008; Ambos and Schlegelmilch, 2009; Bronnenmayer, Wirtz and Göttel, 2016), the research suggests that many aspects of the consultancy-facing role of the management consultant are performed alongside their client work, often on client site. Management consultants transition back and forth between the competing demands of their client system and the internal tasks and responsibilities of their consultancy system. They experience tension between fulfilling client expectations and maximising their
billable hours on the one hand, and performance and development expectations and contributing to the operational needs of their consultancy on the other.

Management consultants separate spatially from their client work to perform consultancy-facing tasks on client site. However, their experience of spatial liminality is somewhat different to Söderlund and Borg (2017: 15) who associate spatial liminality with “a particular place or space that is outside normal contexts, conditions and everyday routines”. In contrast, for management consultants, spatial liminality is primarily related to mental spaces. They also at times combine physical and mental transition, navigating to what they refer to as “secret spots” away from the client, using their liminal position to transition mentally between client and consultancy systems to a mental model that enables them to focus on internal work whilst on client site. There are similarities with Shortt (2015: 635) who claims in her study of hairdressers that liminal spaces that are made meaningful by workers for privacy, inspiration and the like become ‘transitory dwelling places’. However, Shortt (2015) also focuses on physical rather than mental spaces. Management consultants’ mental transitioning between client and consultancy systems has some similarities with Di Domenico, Daniel and Nunan (2014: 266) who found that home-based on-line business entrepreneurs exercise “mental mobility” by mentally balancing the physical and virtual, navigating liminality to cope with tensions that are present in their home-work environment.

Management consultants voluntarily trigger liminal transition by transitioning to a different mental space and sometimes also moving to a different physical space away from the client. Or moving to a different meeting room, even at times switching to their consultancy laptop to achieve the conscious mental and environmental transition they perceive is required. The liminal triggers experienced by management consultants are
similar those of Stenner (2017) who claims that liminal transition may be fabulated, in the sense of being devised, staged and tame. Some consultants experience being able to switch their focus from client-facing to consultancy-facing work more spontaneously when the work is less demanding, suggesting that this is a skill that comes with experience or may be developed. This corresponds with spontaneous liminal triggers defined by Stenner (2017) in the sense of being found, un-staged and wild.

The experience of liminal transition between consultancy and client systems is somewhat different for Directors and Senior Managers compared with their more junior colleagues. They are focused on business development with the client and whatever it takes to sell and deliver new client engagements. They take a more holistic view of client and consultancy systems. Managers leading a sector team, resourced by management consultants aligned to that sector producing collateral from client work that supports the development and future success of the sector team, experience greater synergy between their participation in client and consultancy systems. Directors and Senior Managers perceive more continuity between the consultancy and client systems, they spend much of their time working with both. For them the transition between the two is spontaneous rather than staged (Stenner, 2017).

7.6.2 Navigating consultancy performance and career development expectations

The model in Figure 7-4. suggests that management consultants, whilst engaging with their client, must also manage the performance and career development expectations of their consultancy. The requirement for management consultants to make an internal contribution means that, within their consultancy system, management consultants may be involved in a range of internal projects and must transition back and forth between
their client and consultancy systems. As in the study by Reid (2015), management consultants perceive the performance management and career development process as flawed and open to manipulation. They experience pressure to remain visible within their consultancy system rather than being absent from base office for long periods and relying on multiple managers to speak up for them in annual appraisal meetings. Reid (2015) and Alvesson and Kärreman (2007) argue that consultancies rely in part on performance appraisal as a key driver for consultants.

Experienced consultants learn to be proactive about securing their next client engagement even before their current client engagement comes to an end. Although still liminal with a client they must begin to focus on how they will navigate what they perceive as an internal job market. They use the liminality of multiple belonging to leverage networks and reach out to Career Managers and mentors. Management consultants who are not able to secure a new role immediately perceive themselves as stuck between roles in a rather uncertain position on “the bench”. There are similarities with Daskalaki and Simosi (2018: 1157) who claim that liminars between employments, such as management consultants “on the bench” experience a negative version of liminality where they feel insecure and unable to see how their liminal position between roles will be resolved. Uncertain of the future and unable to project a post-liminal self, they may detach from their professional identity and adopt "liminoid identities”, defined by Beech et al., (2016: 506) as “unresolved identity work”. The research suggests that this feeling of uncertainty is accentuated for new joiners awaiting their first role in a situation they perceive as unfamiliar. In the absence of any consulting experience and no post liminal role to identify with, they are unable to project a post liminal self. However, as in Garcia-Lorenzo et al.(2018), liminoid identities are resolved when liminars are able to identify with a post liminal role. Although, for management consultants, resolution is partial and temporary.
When they secure their next role, they must then cope with being liminal on a client engagement.

Management consultants from all settings use internal networks and internal work to ensure they are visible to senior internal stakeholders and ensure they are not overlooked when it comes to performance appraisals and promotion and to secure their next client engagement and develop skills. Nevertheless, they have very little control over where and when they work. They perceive that utilisation always takes priority and they may experience feeling stuck in a role that is in a different sector or not a good fit for their skill set or does not offer the development opportunities they hoped for. In their study of professionals forced to undertake new roles, Chen and Reay (2020) claim that new professional work can lead to a new professional identity. However, this depends on the professional being prepared to “park” their previous professional identity. In the context of management consulting this means management consultants parking their professional identity relating to the types of roles they are known for and using their experience of being liminal betwixt and between the types of roles they are familiar with to create a new professional identity that meets the needs of the role they are about to undertake. Unlike the professionals in the Chen and Reay (2020) study, management consultants do not have the option of resisting or avoiding the role, or the time to mourn the role that might have been a better fit. They feel they must engage and put the needs of the client first, parking their previous professional identity. They perceive anything short of this will most likely be reflected in negative feedback and an adverse appraisal rating.

Management consultants also experience feeling stuck when career paths or the route to developing the skills required for promotion are unclear. Some experience feeling stuck when promotion expectations are not met because of what they perceive as being let down
by the system or stuck in a role that does not allow them to develop the skills they need to progress. Some are content in their current role and do not want to progress because they perceive the requirements at the next level involve a different skill set and ways of working and they are not ready to make the transition.

Some argue that when there is a lack of clarity over career paths boundaries become blurred and careers become permanently liminal (Budtz-Jørgensen, Johnsen and Sørensen, 2019). However, that implies separation from existing professional identity whereas the research suggests that those unable to see a clear career path, or not wishing to change, do not separate from their existing professional identity. Instead, as in the study by Chen and Reay, (2020) they reject parking their professional identity choosing instead to avoid liminal separation and remain as they are for now. For those who want to progress but feel they are stuck, there are similarities to Bamber, Allen-Collinson and McCormack, (2017) who claim that those feeling stuck in what they regard as a marginalized occupational identity role are in occupational limbo, locked in to an uncomfortable state unable to identify a route to aggregation.

Management consultants who successfully achieve promotion do so by ensuring that others perceive they are already fulfilling the requirements of the new role. Like the Chen and Reay (2020) study but in a different context, those going for promotion must be prepared to park their existing professional identity. The research suggests that management consultants who are promoted sometimes miss their old role and experience a form of grief and mourning, similar to Conroy and O’Leary-Kelly (2014) in their study of work related identity loss. Conversely, the research suggests that those preparing for promotion project their aspirational identity to convince others that they are ready to take on their new more senior status. Those who are promoted experience a more traditional form of liminal transition, first separating both socially and spatially from their previous
professional identity and entering transformative rites of passage, aggregating into their new professional identity (Beech, 2011; Kornberger, Justesen and Mouritsen, 2011). Promotion from one grade to another is one of few instances when management consultants experience the more traditional form of linear, three stage liminal transition.

7.7 Navigating between work and personal systems

The model in Figure 7-4 suggests that within the multiple belonging experienced by management consultants they experience smaller scale repeated transitions where they engage and at times aggregate with personal systems. In this section, I discuss how some management consultants experience a sense of loss when working away from home for extended periods, whilst others are able to benefit from the opportunities the consulting lifestyle offers. Many perceive working long hours is accepted and expected. I discuss the experiences of management consultants in taking what they perceive as control by establishing firm boundaries between work and personal systems, some using the liminality of travel to transition between work and personal systems of engagement.

7.7.1 Experiencing and managing the challenges of the consulting lifestyle

The research suggests that some management consultants experience a sense of loss when they work away from home. They are liminal in the sense that they are separated from their personal system. They miss time with family and social life and find it difficult to maintain relationships and outside interests. Others are able to embrace their liminal position away from home and benefit from the temporary separation from personal systems and welcome the lack of distraction, Management consultants with fewer family responsibilities are able to benefit from the opportunities the consultancy lifestyle offers. For example, Rula as a young graduate, gaining life experience by working and “partying
hard” across Europe. New recruits knowing that they will have to work away from home in the future are in a similar position to when they join a new client engagement of being liminal between not knowing and knowing. They experience fear and anxiety and see being away as something they must endure in the future and learn how to do it.

According to Beech (2011) when liminality is unbounded the natural stress of liminality is heightened by the ambiguity and uncertainty of the situation. By finding ways of continuing to feel part of the family system, creating a more normal life away from home or find ways of spending more time working from home management consultants are reducing the stress of liminality that is not time bound. Management consultants and their consultancies are increasingly aware of the importance of mental and physical wellbeing if they are to make a career in consulting sustainable. Improving wellbeing improves resilience and sense of self and this seems to help management consultants cope with the stress of liminal situations and being a management consultant.

For some management consultants being away from home involves incorporating with work systems by constructing an identity where a single life replaces family life, and outside interests are put on hold. Others construct an identity where they are still members of the family system but in a carefully bounded way, so they are both separated and not separated. They develop bridging routines between work and home systems. For example, Neville who, when he works away, gives absolute priority to his evening call to his wife and child, bridging the liminal space between work and home. In contrast to Turner (1967, 1969) this is not a transitional state for management consultants in the traditional conception of liminality. The in-betweeness of management consultants will not be resolved by re-aggregation using their re-constructed identity. They will eventually return to their personal system where they may still have feelings of liminality with respect to
other systems, and their identity is that they continue to belong to all three. In the meantime they must follow Simon’s (Manager, Perform) lead and “make it work” even in what James (Senior Consultant, Perform) describes as “sub-optimal locations”.

Management consultants with family at home feel more able to cope with the demands of consulting when they have the full support of their partner. Like Neville (Manager, Perform), they find ways of bridging between work and home that enable them to continue to feel part of the family system, reducing the stress of being liminal away from home. Jack (Senior Consultant, Achieve) rents a flat rather than staying in a hotel when he is away from home. By mirroring what he perceives as a more normal home life Jack is reducing the impact of being liminal with respect to personal systems of engagement. Others agree flexible ways of working with the client that enable them to spend more time at home reducing the duration and impact of separation from personal systems of engagement.

In their study of a work camp based in an oil field, Dorow and Jean (2021) found those required to work for long periods away from home develop an abnormal focus on future goals such as early retirement, and the high pay they receive, which they saw as offsetting the sacrifice of family and personal time in a revolving door kind of liminality. There are some similarities with management consultants who refer the high rewards they receive to justify and cope with the feeling of loss and sacrifice they experience when spending time away from personal and family life. John (Director, Achieve) sees time away from family as a trade-off against the benefit for family of high pay. Bernard (Manager, Achieve) acknowledges that he would have to be in a very demanding board level position to earn an equivalent amount and even though he might not be away from home, he would not necessarily have more family time. However, in contrast to Dorow and Jean (2021)
more junior management consultants, rather than focusing on high pay or early retirement, justify the long hours and loss of work-life balance they experience as an investment in career and the prospect of promotion to a more senior grade in the future when they will have more control over where and when they work.

7.7.2 Experiences of using travel as a boundary

Management consultants often travel long distances to and from client engagements, especially when they are working away from home. It could be argued that this is one of the few situations when management consultants experience liminal transition in the more traditional sense, as a linear three-stage sequential process (Szakolczai, 2009). The first stage is separation from one system of engagement. This is followed by the liminal stage, the actual journey and associated uncertainty and sense of being in-between work and personal systems of engagement. The final stage is re-aggregation with work or personal systems of engagement at the end of the journey.

There are similarities with Wilhoit, (2017) who found in her study of commuters that journeys are paradoxically liminal and routine and could be beneficial, offering possibilities not available at other times. However, for management consultants their journey is often much longer than a typical commute, especially when they are working away from home. In contrast to Wilhoit (2017) management consultants did not always find commuting beneficial. Indeed, for some like Jill (Manager, Achieve) and June (Senior Consultant, Achieve), the liminal experience of the journey may be a very isolating, frustrating and emotionally draining experience, as with June who sometimes feels like crying when her journey home is problematic. Or Jill who feels that she “gifts her soul” to her consultancy during the week but then dreads the long journey home and finds “switching off” and transitioning between work and personal systems of
engagement at the end of the journey very difficult. Furthermore, client engagements are temporary, and this reduces the possibility of management consultants benefitting from the commute by introducing performative routines to benefit from their journey.

In contrast others like Alice (Senior Consultant, Achieve) embrace the journey, using the time to work or simply relax, accepting the long journey as part of the job, or James (Senior Consultant, Perform) who experiences using the time to consciously separate work and personal systems, a time to decompress from work by reflecting on the day and avoid taking the stress home. Whether the liminal experience of travel is positive or negative experience seems to depend in part on the type of liminal trigger. The length of journey for all was four to five hours. The experience for June and Jill was negative. In both cases the liminality of their journey was compulsory. In contrast the experience for James was positive. James prefers to commute even when the client engagement is not within normal commuting distance and the liminality of his journey was voluntarily. Although the liminality of Alice’s journey was compulsory, she enjoys travelling and feels rewarded by the opportunity to relax.

The evidence of the research is in contrast to Daskalaki, Butler and Petrovic, (2016) who frame liminality as a permanent phenomenon for those who regularly travel between work locations. They claim that liminality is an unbounded, disorderly transformation and that individuals who regularly travel between locations experience inter-spatial and inter-corporeal liminality, continuously constructing a sense of self and translocal identities on the move. However, whereas management consultants may use the liminality of their journey to develop their temporary client facing persona in preparation for the liminality of their client engagement, the research suggests that for management consultants, the liminality of their journey is bounded and linear. They use liminality to separate from one system of engagement and prepare to engage with another.
7.7.3 Experiences of managing work-life boundaries

In the review of literature Johnsen & Sørensen (2015) define the consulting lifestyle as a ‘zone of indistinction’ a blurring of boundaries where management consultants are in a paradoxically permanent state of liminality suspended between work and personal life, trapped in a liminal threshold world between work and life, having discarded any idea of work–life balance. In contrast, the research suggests that management consultants are able to establish boundaries between work and personal systems that enable them to re-aggregate with personal systems and construct a work life balance that works for them. As a Director, although John (Director, Achieve) still spends half of his week away, he perceives that he has constructed clear boundaries and a balance that he feels is right between time at work and time with his family. John transitions in and out of liminality without compromising what he sees as his accountability to either system. Nigel (Director, Perform) does not compromise when it comes to leaving work on time to meet childcare responsibilities.

Consultants of all grades feel justified in setting firm boundaries between work and personal systems at the weekend. However, even then, there is evidence of some seepage across work-life boundaries. Nigel’s (Director, Perform) early Monday start to travel to his client engagement in Switzerland and especially the alert from his airline 24 hours earlier saying he can now check-in, overshadowing his weekend, and Patrick (Manager, Achieve) feeling that he completely switches off by not talking about work but is still thinking about it. Some management consultants work at the weekends when necessary and like Jill (Manager, Achieve), they sometimes experience guilt when they do so. Nevertheless, they perceive they are maintaining a boundary between work and personal systems of engagement.
At other times, as in the study by Johnsen and Sørensen (2015) management consultants allow work time to converge and spill over into personal time. Some management consultants experience guilt when performing consultancy-facing work during the day on client site and choose instead to perform the work in their own time in the interstices of the day, in the evenings or at weekends. When staying away from home, some management consultants do not see evenings in the week as their own time. They perceive working long hours is accepted, and sometimes expected or they experience themselves as have nothing else to do. This temporary absence of a boundary between work and personal systems of engagement when working away from home, combined with the pressure on management consultants to impress the client and senior stakeholders in the consultancy to get good performance feedback, may explain why some consultants take working long hours to extremes.

In her study of flexible working in a global consultancy, Canibano (2019) found that consultants were able to manage the tension between working flexibly by being available, adaptable and mobile in terms of where and when they worked, whilst at other times being able work from home and be flexible about their working hours. However, the research suggests that not all management consultants have sufficient control over where and when they work to benefit from such flexibility. Directors and Senior Managers perceive they have some control as long as the work gets done. However, more junior management consultants in Achieve and Perform perceive that they have very little control over where and when they work. They perceive they must reach a level that is senior enough for them to have sufficient control to ensure having a work-life balance that will enable them to make a career in consulting sustainable. In contrast, more junior management consultants in the larger consultancy setting of Protect feel empowered to say no to working away...
from home, knowing that other management consultants and other client engagements are available.

Donnelly (2015) claims that flexible working in management consultancy is often interpreted as management consultants being flexible towards the firm and reinforces gender divisions. The evidence of the research supports this to some extent. Female management consultants at lower grades see having children as a barrier to a long-term career in consulting. This may in part be due to the absence they observed of any female role models of similar age and seniority who had been able to sustain a career in management consulting with young children.

Ybema, Beech and Ellis (2011: 28) argue that liminars like management consultants, who do not complete their liminal transition between one relatively stable structure and another, are “boundary dwellers” perpetually liminal actors who inhabit a social ‘no man’s land’. This is in contrast to the evidence of the research which suggests that, whilst management consultants experience a recurring kind of liminality associated with multiple belonging that may at times appear permanent, they seem able to manage smaller scale repeated liminal transitions where they engage and at times experience themselves as re-aggregating with personal systems of engagement and this enables them to experience what they perceive as a work life balance.

When navigating between work and personal systems of engagement, the experience varies according to the management consultants home situation. Those with family at home perceive they are easily able to separate from work systems and re-aggregate with personal systems. Experienced management consultants perceive having support and a stable structure at home that can operate during their absence is a pre-requisite for making the consulting lifestyle sustainable long term. Those who do not have the same degree of
structure at home perceive they are able to protect their social life and outside interests by switching off at the weekends to achieve the work life balance they perceive is important for wellbeing.

7.8 Differences in consultancy settings

In this section I draw together the differences between consultancy settings. As previously mentioned in Chapter 3 Methodology, the selection of three consultancy settings was to ensure a multifaceted account of the phenomena under investigation rather than any intention to select strongly contrasting settings for comparison. There were many similarities in the experiences of management consultants from the different settings but also some differences. The key differences are as follows:

The first concerns control. More junior consultants from, the medium sized consultancy settings, Achieve and Perform, had far less control over where they worked than those from the large consultancy setting, Protect, who felt empowered to choose whether or not to accept a role. Those from Achieve and Perform are therefore less able to set firm boundaries between work and personal systems of engagement, or to benefit from what Canibano (2019) describes as more flexible ways of working that facilitate the construction of a work-life balance. They are also more likely to get “stuck” in a role that does not enable them to develop the skills they need, or is not a good fit, leaving them with no option but to “park” what they perceive as their professional identity to undertake the new role (Chen and Reay, 2020).

The second concerns the lack of structure of the performance management processes in Achieve compared to Perform and Protect, and the absence of performance objectives relating to internal contribution. However, even though internal contribution was neither
required nor recognised in any structured way, Achieve consultants still participated in internal consultancy-facing work. This suggests management consultants perceive the benefits of the communitas of internal consultancy networks to gain a sense of belonging. The research suggests that the lack of structure in performance management processes in Achieve meant that management consultants perceived they were more dependent on the patronage of a senior sponsor to secure the best roles and make progress in their career. This served to increase the pressure they experienced to perform well on client engagements.

The third concerns the nature and geographical location of client engagements. Achieve consultants spent the majority of their time during the week away from home and were often solo on client site. In contrast, Protect consultants were on a large project within commuting distance in central London. Perform presented a more mixed picture of large and small projects and a policy of not asking consultants to work away from home during the week on their subsequent engagement. The research suggests that Achieve consultants are more likely to experience the liminality of their work position as detached and isolated in what Beech et al., (2016) define as unresolved identity work. They also focus more on making the consulting lifestyle work in terms of constructing work life boundaries. In contrast, the geographical location of the Central Government project meant that Protect consultants were far more able to re-aggregate with personal systems of engagement. Further, the size (100 + Protect consultants) and established structure of the engagement meant that some consultants developed liminoid identities (Turner, 1982) where they identify with the client and the client engagement rather than the consultancy and appear unaware and uninterested in developments within their consultancy. A condition described by colleagues as having “gone native”.
7.9  Conceptualising liminality experienced by management consultants

The central research question concerns how management consultants experience and navigate between the competing demands of their client, consultancy, and personal systems of engagement and how conceptions of liminality can illuminate this. The research establishes that management consultants experience many different kinds of liminality, often at the same time. I provide a conceptualisation of these different kinds of liminality in Figure 7-6 below. The primary kinds of liminality experienced by management consultants include multiple belonging; communitas; non-linear and bounded linear liminality. These are shown with definitions and examples. Non-linear liminality is further divided into secondary kinds of liminality: liminoid; positional; temporal; spatial and mental liminality, also shown with examples:
Figure 7-6: Kinds of Liminality Experienced by Management Consultants
7.9.1 Multiple belonging

The overarching kind of liminality experienced by management consultants is multiple belonging to competing systems of engagement. A recurring form of liminality that is so frequent as to at times appear permanent. Management consultants are liminal within their consultancy system. They have multiple managers and experience belonging to multiple teams and networks. Their incorporation within the consultancy system is fluid and fragmented. They engage with client systems but do not re-aggregate with the client organisation. They also experience being liminal between the competing demands of their consultancy and client systems. When navigating between work and personal systems some management consultants experience a sense of loss, others embrace their liminal position and benefit from separation from personal system of engagement.

7.9.2 Communitas

Communitas, anti-structures that exist in contradiction to formal structures (Turner, 1967, 1969) are a key mechanism used by management consultants to cope with their liminal work position. These anti-structures include the consultancy team within a team on client site, informal consultancy networks and liminal pairings with the client. Management consultants experience bonding like a family with their consultancy team on client site, which is even more intense when working away from home, although the hierarchy of the team remains. However, those on client engagements in geographically remote locations, and unable to participate in liminal communities, experience feeling detached and isolated. Those who feel unsupported by liminal and more formal structures experience feeling abandoned.
Liminal pairings are formed when management consultants are able to develop a relationship with their key client based on mutual trust and a shared goal, a liminal pairing then becomes enacted within a dyadic relationship where there is accountability to each other beyond the terms of the formal agreement. Directors responsible for the ongoing relationship with the client are somewhat removed from day-to-day delivery and perceive themselves as being of most value in the liminal position of helpful outsider. Liminal pairings prove impossible to form when client and consultant do not share a common vision or there is a lack of mutual trust or the client does not see the value or relevance of what the management consultant has to offer, or the client feels threatened by the change. In these situations, management consultants may experience liminality as negative and even destructive. There are also occasions when management consultants experience clients wanting to control the outputs of the client engagement where the client engages in trickster-like behaviour (Szakolczai, 2009) leaving consultants feeling trapped in a negative form of liminality, unable to find an exit route.

7.9.3 Non-linear liminality

Whilst experiencing multiple belonging, management consultants experience shorter term liminal transitions that are non-linear. Liminality for management consultants is multi-dimensional as they concurrently experience “positional” liminality in relation to their role “betwixt and between” their consultancy and the client system and “spatial” liminality in relation to their location on client site (Söderlund and Borg, 2017: 15). They also experience temporal liminality between not knowing and knowing and transition to a client facing persona which is short-term and superficial constructed to meet what the management consultant perceives are the client’s expectations. They experience their inside-outsider status as fluid, leveraging outsider expertise whilst developing personal
ties where liminal transition becomes more spontaneous as the relationship with the client becomes more established. Management consultants perform consultancy-facing work alongside their client work on client site and they experience mental liminality where they separate from client work to focus on internal consultancy-facing work. Although already experiencing the spatial liminality of being on client site, they stage transition to a further level of spatial liminality, separating physically by moving to a different space away from the client, on client site.

Liminal transition between client and internal work is more spontaneous where the internal work is experienced as less demanding. Directors and Senior Managers take a more holistic view of client and consultancy systems and do not always perceive a boundary between the two. For them liminal transition is more spontaneous. A further kind of non-linear liminality occurs when management consultants experience feeling stuck either between project roles, or in a role they perceive is not a good fit or where career paths are unclear. In these situations management consultants are at risk of developing liminoid identities associated with a negative version of liminality defined by Beech *et al.* (2016: 506) as “unresolved identity work” where the liminar is unable to visualise their post-liminal identity.

### 7.9.4 Bounded linear liminality

There are occasions when management consultants experience bounded linear liminal transition within their consultancy system. Those achieving promotion experience separation from their previous work identity and re-aggregation with their new work-related identity. They sometimes find it difficult to let go and experience mourning associated with work-related identity loss (Conroy and O’Leary-Kelly, 2014). Those seeking promotion project their aspirational professional identity to convince others they
are ready. Management consultants also experience bounded linear liminality when travelling between personal and work systems (Wilhoit, 2017). Some are able to benefit from the liminality of their journey to prepare to reaggregate with personal systems.

None of these kinds of liminality experienced by management consultants corresponds closely to liminality based on rites of passage in the anthropological literature. Van-Gennep, 1909 (cited in Van Gennep et al., 2019) conceptualised liminality as a temporary state which if it becomes permanent brings that very liminality to an end. Liminality in modern social settings is increasingly regarded as a state rather than a temporal phase. As noted in the literature review chapter, the paradox of permanent liminality is unresolved in the literature. This research suggests there is a middle ground. Management consultants are liminal beings who experience multiple belonging to competing systems, and a form of liminality that is recurrent and may at times appear permanent but where management consultants are at times able to re-aggregate with their consultancy or personal systems of engagement.

The research also suggests that in contrast to extant management consultancy research such as Czarniawska and Mazza (2003) who claim management consultants are simply liminal because of their role, liminality for management consultants is far more complex.
8 Conclusion

8.1 Chapter Introduction

In the previous chapter I discussed the findings of my research and concluded by conceptualising the different kinds of liminality experienced by management consultants and relating this to the central research question. In this chapter I first revisit the research aims and objectives, and the rationale. I continue by using the research questions as a framework to draw together the contributions of the research to theory and practice. I then consider the limitations of the research and the transferability of the findings to other settings. I conclude by reflecting on directions for future research to be advanced.

8.2 Revisiting the research aims and objectives

The aim of the research and central research question was to understand how management consultants experience and navigate the competing demands of their client, consultancy and personal systems of engagement, and how conceptions of liminality could illuminate this. My interest was in the lived experiences of practicing management consultants who were actively involved in delivering projects for clients, and their interpretation of the day-to-day experience of being a management consultant. An important aspect of the research was to understand how the internal consultancy facing role of the management consultant unfolds in terms of the tasks involved and when, where, and how these tasks are undertaken. Existing knowledge of the consultancy-facing role is fragmented in the literature and understanding this aspect of the lived experience of being a management consultant has implications for existing theory on management consultancy and liminality.
Management consulting is described in the literature as a high-stress, high status occupation where high occupational standards are demanded by clients and consultancies (Mühlhaus and Bouwmeester, 2016). Management consultants are described as having a life besides work but discarding any idea of work–life balance (Johnsen and Sørensen, 2015). I wanted to understand what management consultants experienced as effective ways of navigating the demands of competing systems. A further aspect for exploration was to understand how the context of the consultancy team shaped the experiences of consultants including their own role and its context in terms of grade seniority. The responsibilities for each management consulting grade differ. Those at more senior grades have a lower utilisation target and more internal responsibilities and it seemed likely that how competing demands were experienced and managed might also differ. The selection of three consultancy settings that differed in size specialism and geographical reach provided further opportunities to explore how the experiences of management consultants of all consulting grades might also differ.

8.3 Contributions to theory and practice

In this section I begin by outlining how the research contributes to existing theory. I then propose ways in which the research could contribute to practice.

8.3.1 Contributions to theory

I use the research questions as a framework to outline the contributions of my research to theory. I begin with the central research question:
How do management consultants experience and navigate between the competing demands of their consultancy-facing, client-facing and personal systems of engagement, and how can conceptions of liminality illuminate this?

The first contribution is that management consultants experience multiple belonging to their competing systems of engagement, a form of liminality that is recurring and so frequent as to at times appear permanent. Whilst experiencing multiple belonging, they also experience different kinds of smaller scale temporal liminal transitions as they navigate between the demands of competing systems. For example, when engaging with client systems they transition from not knowing to knowing enough to make what they perceive are valuable inputs, and from unknown outsider to someone who understands the client and is at times regarded as an insider. They also transition to a client facing persona they perceive meets the client’s preferences. Liminality for management consultants is therefore multi-dimensional, and at times multi-directional as they transition back and forth between the demands of competing systems. When management consultants separate from their consultancy or personal systems of engagement to engage with the client, they do not re-aggregate with the client system. However, in contrast to Ybema, Beech and Ellis (2011: 28) who describe those who work between organisations such as management consultants as “boundary dwellers”, transitional liminals perpetually liminal actors who inhabit a social ‘no man's land’, there are times when management consultants re-aggregate with personal or consultancy systems. Management consultants experience a particular form of re-aggregation where they appear to take up full membership but at the same time retain awareness of their multiple belonging and remain liminal with respect to other systems.
The second contribution is that the research illustrates the range of ways that professionals such as management consultants experience being ‘betwixt and between’ in current contexts of organising. Extant management consultancy research such as Czarniawska and Mazza (2003) and Sturdy, Schwarz and Spicer (2006) focuses on management consultants being liminal because of their role betwixt and between their consultancy and client systems. However, the research suggests that liminality for management consultants is far more complex. Management consultants are managing the demands of three competing systems. Their experiences of navigating between client and consultancy systems are not so much about how to make productive use of ‘being liminal’ but how to manage the competing demands of parallel systems.

Management consultants’ experiences of engaging with client systems is about productive use of liminality to bring about change within the client system. This is in contrast to liminality for business undergraduates who must master threshold concepts that lead to a deeper understanding and re-aggregation with a new identity of knowing (Hawkins and Edwards, 2015). Instead, management consultants develop a liminal competence of providing inputs without knowing how everything works. They embrace the indeterminacy of liminality and develop new short-term personas. This is similar to interorganizational workers in Ellis and Ybema (2010) who develop shifting circles of liminal identity discursively including or excluding other actors as “we” or “them” to simultaneously maintain and market their professional identity. Management consultants also experience a fluid position in the client relationship between outsider and insider, providing strategic input as outsiders whilst forming close ties as insiders. However, whilst there may be an element of marketing their professional identity, their liminal persona is to meet what they perceive as the preferences and expectations of the client. It is part of their practice and serves a function of enabling them to do their work.
When navigating between client and consultancy systems, management consultants often stage liminal transition by moving physical location to perform consultancy work on client site. This highlights the multi-dimensional nature of liminality for management consultants. Using the typology of liminality in the review by Söderlund and Borg (2017: 15) whilst experiencing the over-arching liminality of multiple belonging, management consultants experience the “positional” liminality of their role between systems, “temporal” liminality of their client-facing persona, “spatial” liminality on client site and a further level of “spatial” liminality to “secret spots” out of sight and earshot of the client.

In contrast to Söderlund and Borg (2017) who focus on spatial liminality as primarily a physical location, the liminality management consultants experienced as of most benefit is being able to transition to a mental space that enables them to focus on internal consultancy-facing work on client site, sometimes without changing their physical location.

Management consultants’ experiences of engaging with personal systems of engagement are about managing participation and transition. They develop ways of being present in their personal systems whilst away from home. Management consultants work long hours because they do not see time away from home as their own, or they feel guilty performing consultancy work on client site and use their own time. In contrast to Johnsen and Sørensen (2015) who claim that management consultants are in a permanent state of liminality, suspended between work and personal systems, the research suggests that management consultants are able to set firm boundaries that enable them to re-aggregate with personal systems of engagement. Although their experience of multiple belonging means that, as mentioned above, they remain liminal in respect to client and consultancy systems, and the demands of work systems sometimes seep into personal systems.
None of the aspects of liminality experienced by management consultants presented in this thesis corresponds closely to liminality based on rites of passage in the anthropological literature. There are occasions when management consultants experience bounded linear liminal transition, for example promotion to a more senior grade, similar to (Kornberger, Justesen and Mouritsen, 2011) or travel between work and personal systems, similar to (Wilhoit, 2017). For the most part liminality for management consultants is unbounded where there is separation from one system but no re-aggregation with another system, in what Beech et al. (2016) define as unresolved identity work.

**How does the consultancy-facing role of the management consultant unfold in terms of the tasks involved and when, where, and how these tasks are performed?**

The research contributes a more thorough and consolidated understanding of the management consultant’s internal, consultancy facing role. Existing theory is fragmented and embedded in research on the different elements of the role (Haas and Hansen, 2005; Alvesson and Kärreman, 2007; Richter, Dickmann and Graubner, 2008; Ambos and Schlegelmilch, 2009; Bronnenmayer, Wirtz and Göttel, 2016) In contrast, this research draws the different elements of the role together and suggests that management consultants perform consultancy-facing work such as: internal team leadership roles, contributing to sales bids, knowledge management and development and the performance management and career development of more junior colleagues, alongside their client-facing work, sometimes on client site but often in their own personal time. This means that they experience competing demands across three systems of engagement: their client, consultancy and personal systems.
A further contribution is that the research extends the study of liminality between management groups within organizations by Swan, Scarbrough and Ziebro (2016). Management consultants are liminal within their consultancy system. They experience multiple belonging within their consultancy system. They usually belong to a capability team and a sector team. They may be members of temporary internal teams developing an internal contribution to knowledge or a new service offer. They may also participate in internal teams focused on aspects such as Diversity and Inclusion They experience fluid management within their consultancy system with accountability to the Lead of each team as well as their Engagement Lead, Account Manager and Career Manager. They experience themselves as liminal betwixt and between these different teams. This understanding of management consultants being liminal within their consultancy system is not explicit in the literature.

**What do management consultants consider are effective ways of navigating the demands of their competing systems?**

A major contribution of the research is the suggestion that management consultants use different forms of communitas, liminal anti-structures that exist alongside and in contradiction to formal systems, and are not bound by formal rules (Turner, 2012), as key mechanisms to cope with their liminal position. The first form of communitas and a key finding of the research, is the relationship that may develop between the management consultants and their primary client that I interpret as liminal pairing, an important mechanism by which consultants experience trust and the feeling that there is a common goal shared by the client. This becomes enacted within a dyadic relationship, where both parties signal informally as well as formally that they are going to support each other beyond the terms of the formal engagement. Hence, liminal pairings proved impossible
to form when client and consultant do not share a common vision or there is a lack of mutual trust or the client does not see the value or relevance of what the management consultant has to offer.

This concept of liminal pairing goes beyond the mutual trust, shared vision and accountability to each other of any client-consultant relationship so far described in extant literature. For example, whereas Czarniawska and Mazza (2003) focus on productive use of liminality and leveraging the power and influence of the client, there is no emotional connection and no real collaboration. Indeed, consultants felt they were there to take the blame for anything that went wrong. Sturdy et al. (2009) describe clients and consultants are working together in partnership, but do not identify the productive use of liminality or bring out the emotional connection. There are similarities to Nikolova, Möllering and Reihlen (2015) with management consultants becoming the client’s trusted advisor. However, rather than productive use of liminal pairing, the focus is more on the consultant signalling ability and meeting the needs of the client rather than on combining knowledge and developing a common vision of the project approach, scope and benefits with the client.

In managing the demands of parallel client and consultancy systems, a second form of communitas used by management consultants as a mechanism for coping with their liminal position is their participation in informal consultancy networks that exist alongside more formal internal team activities. For management consultants in Protect there was the communitas of the graduate network, a communitas that seemed to persist as an informal network with their cohort throughout the careers of those involved. Management consultants in Achieve used communitas to reduce feelings of isolation by meeting up with colleagues on other projects that were geographically close by.
Management consultants in Perform developed informal mentoring relationships. Management consultants were able to use the communitas of informal networks to maintain a presence in the minds of senior stakeholders in their consultancy whilst absent on client engagements, to avoid being overlooked for roles and career development opportunities, and to help them maintain a sense of belonging and identity as a consultant. Conversely those on client engagements in geographically remote locations, and unable to participate in informal liminal networks, experience feeling detached and isolated. This perhaps suggests that other kinds of communitas can fill the void, for example, greater use of social media to help management consultants feel engaged.

A further contribution to theory is the ways in which management consultants experience themselves as developing effective ways of coping with the unbounded liminality of parallel work and personal systems of engagement. Management consultants set firm boundaries they perceive enable them to re-aggregate with personal systems and create a work-life balance that works for them. The research also suggests management consultants develop bridging routines by finding ways of being present in the home system during extended periods away, for example, through regular calls with family. They gain support from clients for what they feel are more flexible work patterns that enable them to spend more time at home, or by mirroring what they perceive is a more normal life when they are away from home, for example avoiding life in a hotel by renting an apartment.

The third form of communitas used by management consultants to cope with their liminal work position is the communitas they experience as their consultancy team within the broader client-consultancy team on client site. Management consultants participating in the research reported experiencing bonding almost like a family with their consultancy
team. A bond that they experienced even more intensely when working away from home. This phenomenon is likely to exist for other groups of management consultant as this kind of setting, being on client site and extended stays away from home, is common for management consultants. These experiences are similar to the communitas described by Turner (1967, 1969) as a close, egalitarian and familial community, a sense of other that exists as an anti-structure, alongside formal structures. However, in contrast the hierarchy of the consultancy team remains.

**How does the context of the consultancy team shape the experiences of consultants?**

The communitas of the consultancy team on client site is not always a positive experience for management consultants. The research suggests that in contexts where a management consultant perceives they are under personal attack from the client, others within the communitas may feel threatened and retreat into self-preservation rather than providing support, leaving the management consultant under attack feeling unsafe and abandoned. This suggests that, in contrast to the communitas described by Turner, (1967, 1969), the informal organisation between liminal consultants on a client site can function, not as a supportive communitas, but as something more individualistic and non-supportive.

**How is the management consultant’s experience shaped by their own role and its context in terms of grade seniority?**

The research suggests that management consultants’ experiences of multiple belonging is shaped by their own role and grade. When engaging with clients, Directors are responsible for the ongoing relationship with the client and are somewhat removed from day-to-day delivery. They perceive themselves as being of most value in the liminal
position of helpful outsider, able to leverage cognitive distance and provide strategic input.

Directors and Senior Managers take a more holistic view and experience greater synergy between their participation in client and consultancy systems. They are far more focused on business development which encompasses client and consultancy systems and transition between these two systems is spontaneous rather than staged, as depicted by Stenner (2017).

When managing parallel work and personal systems of engagement, Directors and Senior Managers experience themselves as having more control over where and when they work compared to their more junior colleagues. They perceive they are able to set firm boundaries that allow them to construct a balance between work and personal systems that feels right and enables them to transition in and out of liminality without compromising what they see as their accountability to competing systems.

The final contribution is methodological and interdisciplinary. Interpretative Phenomenological Analysis (IPA) is a relatively new method first described by Smith (1996). The dominant use of IPA has been in psychology, health and social sciences. The research contributes to the slowly growing body of management and business research using a research design based on IPA. The idiographic nature of IPA and its concern with the particular experiences of individuals enabled me to explore more fully the lived experience of being a management consultant compared to other qualitative approaches. However, in contrast to the more traditional IPA approach of a small homogeneous sample (Smith, Flowers and Larkin, 2009), I wanted to explore some areas of possible difference. By including three consultancy settings my approach embodied an element
of logic of comparison and the possibility of a more meaningful understanding (Bryman and Bell, 2015).

### 8.3.2 Contributions to practice

The research contributes to practice by providing an insight into the concept of liminality and its potential impacts on management consultants, both positive and negative. This insight and increased awareness may enable management consultants to better cope with their liminal work conditions and management consultancies to provide appropriate support. I focus specifically on three key points that emerged from the research, all of which may contribute to lower attrition amongst management consultants and a more productive and skilled workforce. The first relates to ways in which management consultancies may leverage the positive power of communitas and the sense of camaraderie and belonging communitas engenders. The second relates to policies on internal work and the apparent need to re-balance the opportunities provided by internal work for skill development and internal networking on one hand and working long hours producing what management consultants sometimes refer to as “shelf-ware” on the other. The third relates to ways of maintaining and improving wellbeing and making a career in management consulting sustainable through more flexible working.

**Leveraging the positive power of communitas**

Management consultancies may be able to do more to facilitate successful liminal pairing by matching management consultants, not only to the skills required for a client engagement, but also to the perceived disposition of their key client. This draws on Simon’s (Manager, Perform) experience where he perceived he and his client, who he described as “a northern white bloke with an inappropriate sense of humour” were
completely incompatible. Further, some management consultants are skilled at coping with clients who are perceived as challenging. For example, James (Senior Consultant, Perform) who perceived the client was under pressure and resistant to his input. James nevertheless persevered and was eventually able to develop a successful liminal pairing.

Management consultancies could place greater emphasis on facilitating the communitas of informal networks through more formal gatherings. Communitas exists in contradiction to formal structures but is facilitated by them. Management consultancies are aware that formal gatherings help their consultants to gain a sense of belonging and identity as a consultant and all consultancies in the research organised formal quarterly gatherings. However, in the context of communitas, the role of formal gatherings and the benefits of facilitating the formation of such networks may so far have been underestimated.

Management consultancies could increase the awareness of those responsible for resourcing and leading client engagements of the importance of the communitas of the consultancy team within a team on client site. Perhaps by incorporating ways of understanding the potential benefits of communitas in their training and development programmes. The research indicates how destructive liminality can be when the communitas of the team fails and team members retreat into survival mode leaving others feeling abandoned. For example, Rula (Manager, Perform) on an engagement with her previous consultancy, under attack from the client and experiencing a lack of support which she perceived was a result of the project being under-scoped and undersold, and that the pressure had a negative impact on the communitas of the team.
Developing more productive policies on internal contribution

Management consultancies could develop more productive policies in relation to their consultants making an internal contribution. Many management consultants perceived the benefits of internal work for networking, skill development or as an opportunity to be involved in something they felt passionate about. In contrast, a criticism of some internal contributions was that they provided “shelf-ware” and would never be used. There is an opportunity for management consultancies to signal more clearly the activities they value by allowing more of them to be performed within working hours. This would help consultancies focus on which internal activities are valued and management consultants to make a more informed choice about how they spend their time. Such an approach could also form the basis of a less subjective approach to internal contribution within the performance appraisal system.

Making a career in management consulting sustainable through flexible working

Management consultancies could facilitate more flexible working arrangements through their negotiations with clients. The research suggests that flexible working patterns that allow management consultants to spend more time at home and re-aggregate with personal systems of engagement help to maintain and improve wellbeing. The research indicates this is important for management consultants coping with the unbounded liminality of being perpetually “betwixt and between” their three competing systems of engagement.

Lessons emerging from the research may also help individual management consultants. Some management consultants were able to informally negotiate more flexible work
arrangements with their client. As mentioned above, others reduced the stress of unbounded liminality by mirroring what they perceived as a more normal life away from home by renting an apartment rather than staying in a hotel. Experienced consultants perceived that support from partners, developing ways of being present in the home system when you are away and a structure at home that is capable of running in your absence are all crucial to coping long term with the consulting lifestyle.

All of these proposed contributions have the potential to place additional pressure on already fragile margins. However, finding ways to make the a career in consulting more sustainable may be a good investment for consultancies compared with recruitment and training costs generated by high attrition, and management consultants suffering mental health issues.

### 8.4 Limitations of the research

The research was qualitative and relied on semi-structured interviews with practicing management consultants supplemented by initial meetings with senior people within each participating consultancy, operational documents and on-line sources. This is a potential limitation as semi-structured interviews rely on self reporting. Watson (2011: 204) claims participants’ accounts may be exaggerated, selective in their detail in an attempt to “look good” or shaped to fulfil what the participant perceives the researcher wants to hear. He argues that semi-structured interviews are little better than surveys in enabling the researcher to understand “what actually happens” or “how things work”.

However, I feel that my own experience of management consulting was an advantage in enabling me to situate participants’ accounts. As a management consultant, I also experienced the need for continuous self-promotion and securing the sponsorship of
powerful patrons within my consultancy, the late nights in hotels performing internal consultancy-facing work, knowing that life at home was continuing without me. I was also on a client engagement that involved continuous travel between New York and Germany for three years which, whilst quite exciting on the one hand, made it impossible to have much of a home life beyond the three nights every two weeks I spent at home. I also experienced many close working relationships with key clients which I now interpret as liminal pairings. As in, Ellingson (1998, cited in: Pillow, 2003) the findings of my research are inevitably “contaminated” with my own lived experiences. However, I mitigated the impact through reflection, reflexive note-taking and other reflexive steps outlined in Chapter 3: Methodology. I remained very receptive to data that suggested that the experiences of participants did not always mirror my own. These steps minimised my own bias both in the questions asked and my interpretation of the answers. My data is therefore valid, at least for the settings studied.

There were 28 participants across three consultancy settings, and this is a limitation of the research. However, there are number of factors that mean the findings from the sample is likely to be of wider relevance. The number of participants is appropriate if not somewhat larger than average for an IPA study because of the in-depth nature of the analysis. The research participants were all practicing management consultants and at least one participant from each consultancy was Director level and part of the senior team of their consultancy responsible for input to policy. I wanted to avoid what Sturdy (2012) describes as the dependence of management consultancy research on formal accounts from senior staff and public documents, towards an understanding of the lived experiences of practicing management consultants. I therefore decided not to interview others within the consultancy such as Human Resource Managers or Operations Managers responsible for resourcing projects or very senior people not directly involved
in delivery. My interviews with CEOs and Senior Partners who were gatekeepers were focused on access rather than their experiences of navigating competing systems. Interviews with those not directly engaged in delivery would have provided a different and potentially useful perspective, but that was not the focus of this research.

The participating consultancies were all recruited through the MCA whose membership accounts for sixty percent of consultancies in the UK, and this may have introduced bias. However, the MCA claim that their membership is representative of the UK consulting industry as a whole (MCA, 2021). Participating consultancies were all located in the UK, and this is a potential limitation. However, management consultancy is a global phenomenon. Indeed, two of the consultancies in the research operate globally. The main difference in management consultancy between different global regions, other than industry size, appears to be the focus of management consultancy engagements on regional issues rather than the practice of management consulting (Statista, 2021). It seems that the research settings are therefore still relevant and valid for the research questions.

The research settings varied in size, specialism and geographical location. The settings did not include a “big four” consultancy but many participants from Perform had previously worked for a “big four” consultancy and related their experiences. There were also differences between research settings in their approach to performance management and the extent to which participating management consultants spent time away from home. However, there were very few differences in findings of the experiences of management consultants between the three consultancy settings. It therefore seems likely that management consultants employed by a consultancy meeting the basic criteria relating to minimum size, reputation and focus would have similar experiences to those
presented in this research. The findings may also be transferable to other settings that involve interorganisational workers performing high value work for clients, such as Project Managers and other professional services for example, Auditors or other forms of consultancy for example, Engineering and Architecture.

8.5 Directions for future research

The majority of the limitations identified for the research are methodological. A future direction could be to abductively test the contributions to theory with a larger or more global sample using a different methodological framework such as grounded theory. IPA is concerned with the micro-analysis of individual experience arising from the detailed exploration and presentation of examples of human experience (Smith, Flowers and Larkin, 2009). This is not to say that IPA cannot support macro-level claims but an appropriate next step could be to follow up with a methodological framework that more specifically aims for macro-level claims such as the constructivist grounded theory proposed by Wertz et al. (2011) which begins inductively and then uses abductive logic to test hypotheses with the aim of generating theory.

The research indicated that more junior female consultants did not see a career in management consultancy as sustainable if they wanted to have children. This was recognised as an issue by John, a Director in Achieve where the majority of the work involved being away from home during the week. John expressed concern that the consultancy risked losing valuable skills but did not see an answer. Future research with female role models in the industry, management consultants who have made a career in consultancy whilst caring for young children, is a direction that could contribute to theory by building on existing literature such as Donnelly (2015) and also make what could be a valuable contribution to practice.
The research was conducted in 2019 prior to the Covid-19 pandemic. The MCA, which represents sixty per cent of the management consultancies and fifty per cent of fee income in the UK, report in their Member Survey (2021) that management consultants were able to successfully work remotely with clients during the pandemic and, by developing new digital ways of working, were able to increase the export of consultancy services. However, many management consultants found the reduced interaction with clients challenging. As a result of the pandemic, 44% of MCA members anticipate that consultants will typically go into the office 2 or 3 times a week and over half (55%) expect their organisation’s overall office workspace to decrease. There is a widely held view that the pandemic has accelerated the trend towards increased homeworking (Economist, 2021). If the trends anticipated in the MCA Member Survey are realised, this will have an impact on the experiences of management consultants. Given the findings of this research and the importance of liminal pairing with the client and management consultants’ sense of belonging on the one hand and the need to achieve a work-life balance on the other, a useful direction for future research once we can safely say the pandemic is behind us would be to understand the post-pandemic experience of being a management consultant. In particular the implications for kinds of liminal anti-structure such as communitas and liminal pairings.

There are also a number of potential theoretical directions for future research. These stem from themes emerging from the research that do not directly relate to the research questions and therefore remain under-developed. I discuss three potential themes for further development.
The first of these is the exercise and effects of power in management consultancy. In their review of management consultancy literature, Mosonyi, Empson and Gond (2019) identify the dominant themes as knowledge, identity and power. They claim that of these, power is the least well developed. The research revealed the dynamics of power and control that exist in the relationship between client and consultant and how this was intensified when management consultants were working with other suppliers. Further research on the power relations between client and consultant and within multi-supplier teams working for a client with competing claims for establishing status and power, and the actions that may lead to reconfigurations of status and power, may provide useful insights (Levina and Orlikowski, 2009).

A further possible theme for development is performativity defined as “doing things with words” (Austin, 1962, cited in: Lockwood, Giorgi and Glynn, 2019: 14). The concept of performativity may prove to be a useful analytical tool to understand the relationship between transformational change, discourse and power, within a consultancy engagement or other transformational change situation. The research also revealed a wealth of discourse relating to how management consultants navigated their consultancy performance management system and the high levels of performance demanded by client and consultancy. Indeed Johnsen and Sørensen (2015: 334) described the experience of the management consultant in their study as an ‘endless source of performativity’ as his work revolves around ‘complex and continuous self-expression’. This aspect of the experience of being a management consultant could be developed in a way that contributes to the critical performativity literature (Spicer, Alvesson and Kärreman, 2016).
A third theme to emerge from the research and remain under-developed is management consultants’ experiences of emotional labour where true feelings must sometimes be suppressed and at other times amplified in interactions with the client (Izsatt-White and Lenney, 2020). There is scope to build on the research in a variety of organisational change situations to provide an insight into the role-based enactment of emotional labour and the navigation of power dynamics between those driving change and those on the receiving end.

These are just three themes in the data that may provide the basis for future development.
9 Appendices
Appendix 1 Research Information Sheet

PhD Research on Management Consultancy:  
A study of the dual role of the management consultant

Background
The research builds on a pilot study conducted in 2017. The study established that management consultants have a dual role, their client facing role and their consultancy-facing role. Whilst existing academic literature on management consultancy focuses on functions of the consultancy-facing role such as knowledge management, people management, business development and some operational aspects of management consultancies, the consultancy-facing role of the management consultant and the existence of a dual role for management consultants is not explicitly recognised.

Aim and Objectives
The aim of the research is to gain more in depth empirical understanding of the consultancy facing role and the interplay between the consultancy-facing and client-facing aspects of the dual role.

The objectives are to explore:
- How the consultancy-facing role of the management consultant unfolds in terms of the tasks involved and when, where and how these tasks are undertaken.
- How management consultants experience and manage the interplay between the consultancy-facing and client-facing aspects of their dual role.
- What management consultants consider are effective ways of managing the dual role.
- How management consultants experience the dual role is shaped by their own role and its context in terms of grade and experience.
- How the context of the consultancy team shapes the experiences of consultants.

Research strategy
The research is qualitative based primarily on semi-structured interviews with management consultants across a range of consulting grades. The emphasis is on understanding the practices and lived experiences of management consultancy from those directly involved in delivering projects for clients. The research adopts a case study design where the researcher employs similar methods in consultancies that vary in size, or that operate in different market segments. The aim is to interview eight to ten management consultants from each consultancy. Ideally, participating consultants will be part of the same project team or practice so as to explore the impact of team dynamics on the experiences of individuals.

Ethical considerations
Participation in the research is subject to the prior, informed consent of the management consultants involved. Participants will be briefed before the interviews start. They will also be provided with a leaflet explaining the aims and objectives of the research. Interviews will be audio recorded to ensure contributions are accurately captured or written notes may be taken if preferred. Consultants will have the opportunity to review the final transcript of the interview to ensure it accurately reflects their views. Data will be anonymised and stored securely. Participation is confidential, participating consultants and consultancies will be referred to throughout using pseudonyms.

Benefits for practitioners
Participating consultancies will receive a copy of the key findings, including insights for practitioners. These insights are expected to be relevant to retaining and developing consultants. For example, identifying ways of working that help consultants to manage their dual role, whilst leveraging opportunities to build skills and internal networks, translating projects into development opportunities and working flexibly to achieve greater work-life balance.

Jeanette.Hartley@open.ac.uk
2019, v0.1
9.2 Appendix 2: Information Leaflet and Consent Form

Information Leaflet

I am a PhD student at the Open University Business School and I am conducting research into management consultancy. A pilot study in 2017 established that management consultants have a dual role, their client facing role and their consultancy-facing role. The aim of the research is to gain a more in depth empirical understanding of the lived experience of the consultancy facing role and the interplay between the consultancy-facing and client-facing aspects of the dual role

The objectives are to explore:

- How the consultancy-facing role of the management consultant unfolds in terms of: the tasks involved and when, where and how these tasks are undertaken
- How management consultants experience and manage the interplay between the consultancy-facing and client-facing aspects of their dual role and the strategies they employ
- What management consultants and other actors consider are effective strategies for managing the dual role
- How the management consultant’s experience of the dual role is shaped by their own role and its context in terms of grade and experience
- How the context of the consultancy team shapes the experiences of consultants

Data will be gathered through face to face semi-structured interviews lasting approximately one hour with the potential for a follow up interview should additional information or clarification be required. The researcher may also make field notes and reflexive notes to provide context. The interview will be audio recorded to ensure that your contribution is accurately captured or if you prefer, written notes can be taken instead. You will have the opportunity to review the final transcript of the interview to ensure it accurately reflects your views.

Extracts from your interview may be included in reports to be submitted by me for examination at the Open University and may also be used in papers for publication however, your responses will be confidential, and any such extracts will be carefully anonymised. The research will follow the Open University research ethical guidelines. At the end of the research, a summary copy of the research findings will be forwarded to you on request. The data generated will be stored at Open University and will be destroyed after five years.

Participation is voluntary, and you may withdraw from the research project at any time up to one month after the date of the initial interview. After this point data will have been processed and it will not be possible to extract the specific data you have provided. Similarly, in the unlikely event that you should feel unhappy about anything you said and would like me to remove it from the records, you can contact me on the email below and I will remove all or part of your words. This can be done at any point up until one month after the interview.

Data will be referred to using a pseudonym in any publications arising from the research. The data generated will be securely stored and password protected on Open University servers and will be destroyed after 5 years

Thank you very much for your time and assistance.

Jeanette Hartley
PhD Student,
Open University Business School,
Walton Hall,
Milton Keynes,
MK7 6AA

If you wish to talk to a third party about this research, you can contact my research supervisor Professor Richard Holti at Richard.Holti@open.ac.uk.
Consent Form

Faculty of Business and Law
Open University Business School
RESEARCH PROJECT
Management Consultancy:
A study of the Dual Role of the Management Consultant

Name of participant: [Name]

Name of principal researcher: Jeanette Hartley

1. I consent to participate in this project, the details of which have been explained to me, and I have been provided with written information to keep for future reference.

2. I understand everything that is in the written information namely that I will be interviewed, and I agree that the researcher may use the results as described in the written information.

3. I acknowledge that:

   a. I have been informed that I am free to withdraw from the project without explanation or prejudice and to request the destruction of any data that have been gathered from me until [Date of interview + 1 month]. After this point data will have been processed and it will not be possible to withdraw any unprocessed data I have provided

   b. The project is for the purpose of research

   c. I have been informed that the confidentiality of the information I provide will be safeguarded subject to any legal requirements

   d. I have been informed that with my consent the data generated will be securely stored and password protected on Open University servers and will be destroyed after 5 years

   e. Any data from me will be referred to by a pseudonym in any publications arising from the research

   f. I have been informed that a summary copy of the research findings will be forwarded to me, should I request this.

I consent to being audio-taped/video-recorded □ yes □ no (please tick)

I wish to receive a copy of the summary project report on research findings □ yes □ no (please tick)

Participant signature: [Signature]
Date: [Date]

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308
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