Close Encounter: Finding a New Rhythm for Client-Consultant Collaboration

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In the current economic uncertainty ethnographic consultants are asked to intensify their client focus and to demonstrate and improve the relevancy and impact of their work. This paper reports on a case of close collaboration between client and consultant during an ethnographic consulting project. It discusses three crucial challenges: the challenge of aligning expectations and clarifying roles, the challenge of cultural differences and confusion over ethnographic methods, and the challenge of finding the right rhythm between close interaction and useful separation. Written from both the consultant and the client perspective we describe how similar situations were experienced differently by both parties, analyse what underlies some of these tensions, and suggest some lessons for ethnographers and clients alike for future close encounters. The paper suggests that the central challenge lies in finding the right balance between client-emic and client-etic positions and in inviting clients into the process of doing consulting 'magic'.

INTRODUCTION – DEMANDING HIGHER IMPACT

In the current uncertain economic climate companies need to be assured even more than in the past that their investments will yield clear and expected returns. The days when companies spent money on exotic research projects, on nice-to-have rather than must-have studies seem if not gone then at least suspended. In such a climate business anthropologists and ethnographers working as consultants are asked to justify and demonstrate the relevancy, contribution and impact of their work to their clients with renewed urgency. They must show convincingly that they are useful and trustworthy advisors to their clients.

A growing strategic demand from clients for ethnographic consultants is to engage with them more thoroughly and deeply during projects, rather than remaining purely external professionals who hand over insights and recommendations at the end of projects – as if from the protected laboratory. Bridging worldviews and raison d'êtres, of course, has always been a crucial task for ethnographers, and the ethnographic toolbox has provided us with the means towards studying the real world and real people. Yet we tend to employ these skills towards understanding our informants and less towards understanding our clients and our interaction with them. As a result, a close engagement between client and ethnographic consultant poses unanticipated opportunities and challenges—making it a worthwhile learning experience on how to involve clients to produce results that have traction and are likely to live on once the consultants have left.

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Using an actual project as example, this paper focuses on the challenges emerging from the close collaboration between client and consultant during the course of a project. The example raises significant questions about the ways in which the two respective professional practices need to be coordinated and synchronized to find the right rhythm in the dance between client and consultant. Speaking from both perspectives, the consultants' and the clients', we seek to illuminate what can be learned from such client-consultant collaboration for a more engaging, successful and long-lasting embedding of ethnographic practice in industry.

Collaborative approaches have a long tradition in ethnography, as described for example by Lassiter (2005). However, whereas Lassiter and similar discussions focus on the need for a collaborative approach between researcher and informant in the production of ethnographic texts, this paper explores the collaboration between consultant and client, where the friction plays out in different ways.

In our discussion we seek to address the following questions: Can such an intimate interaction in fact achieve what it sets out to achieve, that is to tailor the results of ethnographic inquiry and resulting recommendations to the client's needs and deliver them to be implemented with success? How can clients become credible ambassadors of the project in terms of both results and methods? How can consultants find the right balance between being insiders and outsiders to both keep a fresh perspective and enable impact? And how can ethnographic consultants who often produce their work behind closed doors be transparent at the same time as they try to be persuasive, how can they closely engage with the client while coming to grips with complicated findings – or advise at the same time as they analyse? While tackling these questions, our primary focus is on the challenges and problems client and consultants face in such a close encounter.[1]

SETTING THE SCENE FOR COLLABORATION

In the fall of 2008 our consulting firm conducted a research and consulting project for a global hearing aid manufacturer. The project's overall goal was to improve the client's understanding of the daily work practice of the independent retailers who usually sell the devices to end-users—a business-to-business project. Field research was conducted in two main markets, the US and a European country. The immediate client who initiated the project was an innovation and design unit within the client organization. The unit's mission

1 Although the client is co-author for this paper, it was predominantly written from the consultant perspective—EPIC, after all, is the ethnographic consultants' community and audience. Yet the clients' experience, their thoughts and opinions are present throughout the paper paraphrased or as actual quotes drawn from discussions and a text written by the client as foundation for this article.

was to discover customer insights, subsequently build competencies and inspire the engineering-focused organization to get closer to their customers and end-users.

As a consultancy based on ethnographic practice we have always aimed at making the client part of our processes at relevant points in a project. For instance, we usually bring the client with us to the field in order to expose them to the real world and our methods. And in order to become more familiar with data and insights, we always organize collaborative workshops during the course of projects. Yet, in this project we took the client engagement to another level. Rather than having client team members interacting with our project team just intermittently, the ambition was to establish a fully collaborative client-consultant team that would work together during all project phases, from beginning to end.

The team setup was not without challenges. Our team had two project managers and was staffed with a roughly equal number of employees from our consultancy and the client organization—three core team members on our side and two full and two half-team members on the client side, with a cross-functional representation from marketing, software development and the innovation unit itself (the client project manager was from the innovation unit). As close collaboration was a high priority we were allocated a dedicated space in an open office environment at the client's headquarter and were encouraged to work there as much as possible.[2]

The intent behind this arrangement had several dimensions. The client had commissioned user-centric consulting projects before and had learned how quickly otherwise useful insights could get lost in their organization. By participating in every step of the project they wanted to ensure relevancy of the insights and warrant organizational ownership of the results. The team members should become ambassadors of insights and recommendations once the consultants left. They also hoped for more relevant and interesting insights where the consultants could utilize and build on the client's insider knowledge of their products, the market and the business-to-business situation under study. Furthermore, the clients hoped to extend their own innovative capabilities by learning from the immersion in the methods utilized by the ethnographic consultancy. Finally, they sought to assure a high level of internal collaboration and buy-in by having team members from different units and departments work together on this project.

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2 Beyond the immediate team part of the project was a senior management steering group and an internal stakeholder team consisting of twelve members of the client organization representing different functions and departments. This setup aimed at further facilitating internal buy-in before, during and after the project. The commitment of the steering group and stakeholder team was an important element in establishing a sense of urgency surrounding the project at the client organization. This was given momentum through the dedicated effort of the leader of the innovation unit.

Quite similarly, based on previous projects we as consultants also knew how difficult it could be to have our insights and recommendations actually taken up and implemented by our clients once we leave. We had learned that it took more than just striking insights and a nice presentation to make changes happen in large corporations. Working closely with clients at every step, we hoped to better understand the client, their organization and their everyday and strategic needs, and thus be able to develop recommendations and concepts that fit.

Following this plan we in fact worked more or less as a collaborative team through every phase of the project. We defined the scope of the project, planned the fieldwork, recruited informants, went into the field, analyzed the data, organized workshops with the larger client stakeholder group, developed recommendations and presented large parts of our final presentation – all of this more or less together and over a period of about three months. This degree of collaboration was as new to us as it was to our client.

Overall the embedded format worked quite well. From our perspective, we did in fact understand our client more deeply than we could have through other means. The growing trust between us made it possible to learn about political issues within the organization beyond official stories that we needed to be aware of. The advantage of spending so much time together was that "it created an open atmosphere with humor where nobody was afraid of saying what was on their mind and whether they disagreed with the other team members" as the client put it. The embedded team approach was a very useful ethnographic setup to get closer to the client both through conversations and observation. As a result we believe our recommendations were in fact better aligned with the client's needs, expectations and capabilities. Our physical presence at the client's premises over a three-months period was also helpful in another respect. Our visibility at lunch and in the open space office generated a kind of curiosity for the project that laid the ground for more easily spreading insights and recommendations throughout relevant parts of the organization. We no longer were external strangers who handed over exotic insights but "people we have seen before and whom we know can be trusted".

For the client, the collaborative setup was overall also successful since they felt they learned the process of user-centric innovation from the inside out and through all stages, not only in theory but in practice. As innovation unit with a user-focus they could expand their skills and move closer to conducting such a project by themselves. But even more importantly the client team members stood behind the insights as proud co-creators. They became successful ambassadors for the project insights, spending several weeks after the official end of the project busily presenting the work to different parts of the organization, facilitating workshops and having informal conversations throughout the company. They owned the project results and were able and willing to not only communicate but promote them.

CHALLENGING THE CLOSE ENCOUNTER

However, for this paper we have chosen to emphasize the challenges that emerged and not the successes, in order to be able to learn from them for future projects. In the following we will discuss three: the challenge resulting from different expectations of roles and responsibilities among clients and consultants, the tension emerging from different professional cultures and levels of expertise, and the tricky task of finding the right distance in the dance between client and consultant (and the problem of doing magic in the open). We describe how clients and consultants experienced these situations as problematic in their own respective ways and ponder what it is that may underlying forces may have led to these situations. Finally we suggest what may be learned from these cases for a more productive close client-consultant collaboration.

Mismatched Expectations – Who Is In Charge?

"We as a company had bought the consultancy's knowledge and competences, and at the same time we wanted to be an integral part of the whole project – so who had the responsibility?" One of the single most important challenges for every team project is to clarify roles and expectations. As the previous quote from our client illustrates, this is not always a simple process. We as consultant assumed that we were responsible for the project while it was ongoing and the client team would be responsible once the consultant team had left the building. Yet, who was in charge was not really settled from the beginning and this created some tensions along the way. The core of this tension was that both parties strongly identified with the project and saw their reputation on the line. The result was a cautious and not so cautious dance between the two project managers to make sure that every voice was heard while asserting their own point of view.

The best example of this initial struggle about who was in charge, was the scoping process at the beginning where a shared definition of the actual scope of the project was to be established: what the project was really about and what was to be part of or outside of the focus of the project. The re-scoping of an initial project definition described in a 'Request for Proposal' (RFP) is common practice among many consultancies (Chang and Lipson 2008). Going through the RFP we investigate how the goals of a project fit into a wider context and often find it necessary to challenge the existing view of the company by redefining what the most relevant problems should be. Yet whereas the level of re-scoping in many projects is decided upon mainly during the initial kick-off meeting, in this case the process took longer and was more intense. We met surprisingly strong resistance from the client against our suggested approach. While the initial project definition had its focus on the interaction between retailer and hearing aid patient, we, the consultants, suggested a somewhat broader focus to also understand the context of this interaction. But the client was afraid to lose specificity of the results with such a wide research scope. For a while we felt out of step with each other and the scoping process took much longer than expected as both parties felt equally in charge. In this as in other cases, visual models, for example of the overall research scope of the project, often became the best way of establishing a common ground linking our different understandings and thus enabling agreement. The model helped, for instance, to define what we meant by context and that both parties agreed on the core question.

Expertise And Cultural Tensions: How Do We Create A Common Language?

It can lead to uncertainty and frustration when people with uneven levels of experience and expertise in a particular method work together in a team. In our case it required some time and effort to work productively with team members who were not trained ethnographers and had limited research experience (the project manager was the only one with qualitative research experience). Involving non-ethnographers in all aspects of the project created tension points especially during times of high production pressure. Both sides struggled in their own ways with the tension between learning/teaching and working productively as a team. For the client it was at times disappointing or irritating when they felt that the consultants revised or even redid their work. From the consultants point of view it was hard to both teach their new team members and at the same time meet critical deadlines.

Yet it is also important to understand the cultural differences of the two organizations involved: the ethnographic consultancy on the one hand and the client with a strong engineering backbone on the other. Anyone with experience in qualitative research knows that analysis is rarely a straightforward process where every single step can be planned and executed according to specifications. Rather it is a messy world of interpretations, of going back and forth, up and down, and in and out of the material. For members of an engineering culture the level of uncertainty that especially ethnographic projects entail turned out to be rather confusing (Forsythe 1993) and the fact not every step was systematically defined made some uncomfortable.

One example was the documentation of fieldwork. As professionals we are used to putting our immediate impressions on paper, writing thick descriptions and increasing the authenticity of our accounts by hopefully creating meaning as we write. However, we are not always clear or able to explain about how we actually deploy words and construct our sentences in that manner (Lassiter 2005). When asked by our non-trained colleagues what to focus on when writing fieldnotes our immediate response was to focus on "everything"—a response that did little to help them. Although we produced an elaborate fieldwork guide with detailed questions and guidelines on how to interview and observe when in the field, the non-ethnographers still were terrified by the uncertainty regarding where to focus their attention and how to select what to document.

The Dance – How To Be Close While Keeping The Distance?

Probably the biggest challenge for both parties revolved around the level of participation in decision-making and in setting the directions for the project, in particular with regard to data analysis and development of recommendation and concepts. As we explained earlier the original intent was to have client and consultants share as many activities as possible and involve them equally in the project's direction and results. Yet this was harder to realize than anticipated and resulted in different types of frustration for clients and consultants. One story from the project may illustrate how this tension played out.

After field research had been conducted and the initial coding of videos had started our team went into Christmas break with the plan to continue the work in January. Yet, due to a sudden and unforeseen opportunity for an executive level meeting right after the break, the client owner of the project asked two members of the consultant team to prepare a presentation over Christmas that should also include a first cut on insights from the research. Although insights analysis had not started, this forced the consultants to come up with preliminary insights on their own, in order to not let pass the opportunity for feedback from the client executive. While the results were ad hoc and preliminary they did feel to the consultants like a reasonable first step towards pattern analysis and insight finding. In January, however, when the full team met for the first time after the break, the existence of this presentation with alleged insights generated a small uproar from the client team. One client explains: “After Christmas everybody came back and thought we should start analyzing the data. However, at that time some of the consultants had already done some of the work because they were asked to give a presentation for an executive. After the consultant team had shown the presentation some of us felt that something was being imposed on them.” For the client it felt almost like betrayal: breaking the mutual agreement to develop things together. The client team members felt left out and robbed of the opportunity to do their part in the project and to learn how to do insight analysis.

Due to these complaints the preliminary insights developed over Christmas were left untouched in the subsequent process, and the team started more or less from scratch developing insights in the proper collective manner. For the consultants this was a less than perfect outcome, as it felt like going backwards at a time of tight deadlines.

A similar situation arose towards the end of the project. Feeling the pressure of the final deadline the consultants wanted to break down the workload into separate work streams for client and consultant teams. This again created tensions since the client felt not close enough to the development of part of the recommendations. At the same time the consultants were concerned that working collectively on all tasks would slow down the process and pushed their plan through. While this division of labor worked well in terms of efficiency, it had problematic consequences as the client team did not feel the same degree of ownership over these recommendations and did not become effective spokespersons for them.

There were more situations where we consultants were tempted to escape briefly from the panopticon of the embedded team to work in the way we wanted and without witnesses. Sometimes we gave in to that desire but more often we did not.

UNDERSTANDING THE UNDERLYING DYNAMIC

Some of these conflicts and frustrations are easy to understand and their causes obvious. It is not surprising, for examples, that uneven skill levels and unaligned expectations may lead to conflicts. Nor is it unexpected that different professional cultures may cause friction when people work together in teams—although it may still be hard to predict where and how trouble would occur. Yet some of the consultant reactions in the last examples invite further explanation. What was really behind the desire for separation?

The Rhythm of Emic and Etic

It was only at the end of the project that we, the consultants, started to make sense of the nature of the tension we had experienced. It was a conflict between two opposing needs: the need for an external position away from the client and for a position close to the client—both equally legitimate and necessary. Like ethnographers, consultants gain from the tension between inside and outside and need to shift between both positions to make their contribution valid. For ethnographers this is the well-known dialectic between emic and etic, between thinking from the perspective of the members of the culture they study and taking an outside perspective, for example that of professional anthropologists, social theorists or members of Western culture more generally. Only in combination may the perspectives yield profound insights.

For consultants there is a similar balancing act, in this case between thinking from the perspective of the client on the one hand and taking an outsider stance from which the client perspective can be challenged on the other. The position of traditional consultants is the client-etic, outsiders looking in. In the best case external consultants present the perspective of Schutz' stranger who, with a different worldview than the field she enters, serves as interpreter of cultural patterns (Schutz 1944). Ethnographers are especially equipped to also take a client-emic perspective, seeing things from the perspective of the client. Ethnographic collaboration in a close team ensures higher levels of ownership on the client side by opening the work process to their voices and perspectives.

As we had to learn during this project, the movement between ethnographer on the one side and consultant on the other, between insider and outsider, resembles a delicate dance. If the proper balance is kept and the rhythm works, the tension is productive. If pushed too far in one direction, the process starts to feel out-of-sync, unproductive and constraining. Going too client-etic, the client perspective may not be adequately included and insights remain foreign. Going too far in the client-emic direction carries the risk of losing the fresh outsider perspective and therefore the ability to think differently and challenge the client, taking away their opportunity to learn something new. In our case the aspiration of constant collaboration and sharing tended to deprive the consultants from their ability to step back and claim a necessary client-etic distance, if only for some moments.

Reflecting Our Roles, Skills, and Ethics

Magic Without the Curtain – How to Advise and Analyse?

In addition to the challenges of finding the proper rhythm between distance and closeness, there was another reason for tensions to emerge from the close collaboration between client and consultants. Like the emic/etic dialectic we did not fully appreciate it during the project. To put it simply, only afterwards we came to realize that an important part of the self-understanding as consultants was doing magic, and that it required some kind of curtains.

One of the unwritten rules in our consultancy is that client time is professional time: we should strive to perform our very best and to always act according to professional standards in the presence of a client. Moreover, it appears that the reputation and professional self-understanding of consultants more generally rests to some degree on the ability to perform a kind of 'magic'—to appear with a bunch of slides presenting a neat segmentation, surprising insights or unexpected concepts. These 'we-never-thought-about-that-but-now-that-you-said-it-it-seems-so-obvious' types of insights appear simple but actually rely on hard work. It is a type of hard work that better takes place backstage because it can be messy and confusing and requires several attempts before persuasive clarity is reached.[3] Yet beyond the quality of insights and solutions the reputation of being good consultants seems to be strengthened by the way in which such sharp analysis and concise concepts are put forward in a gesture of revelation—similar to the unveiling of a new car design where the success and the 'Wow!' from the audience at least to some degree lies in the moment of surprise. Traditionally such magicians' work takes place behind curtains or in the dark, in order to have the insights shine even brighter once they are exposed to the eyes of the audience and in order to not reveal all the tricks of the trade while the show is going on. Like sausages and scientific facts, business solutions are best enjoyed with the traces of their production removed in the moment of consumption (Latour 1987).

In this project, perhaps the greatest challenge for us was the lack of opportunities to perform such analytical or problem solving magic. In a close collaborative team there are no curtains and the tricks have to be conducted in full daylight standing in the middle of the audience, or more precisely by having the audience help with the tricks. The outcome may be brilliant work but will not elicit the same 'Wow' and will not feel like magic. At least this is how we as consultants often felt during this project. Thus we tried from time to time to sneak away in order to perhaps perform some magic after all. Yet for the client our sometimes haphazard attempts to briefly step behind the curtain were interpreted differently – as distancing or being "too deadline-focused", as self-serving, or even as betrayal. If doing magic is an important part of the professional identity of consultants, the question is how much entanglement is necessary in a collaborative project to ensure client impact and

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3 We had clients explicitly mention that they expect magic from us: unexpected and brilliant insights and solutions that they themselves have not been able to come up with—after all, why would they have hired us otherwise, they said, obvious ideas they could come up by themselves.

ownership. Being perceived as self-centered is certainly the worst thing one can do if building a trusting relationships with clients is the goal (Maister et. al 2001).

CONCLUSION – LESSONS TO LEARN

This paper focused on the challenges involved in finding the right rhythm for a close collaboration between client and consultant. We reported on the case of a highly embedded project team intended to involve clients more than usual in insight analysis and development of recommendations to achieve more relevant insights and higher impact at a time of economic uncertainty. We laid out that although highly beneficial overall, this approach also generated some tensions and frustrations for both clients and consultants. We highlighted three critical challenges and their underlying dynamics in order to illuminate potential implications for future close client-consultant encounters. The challenge of aligning expectations and clarifying roles, the challenge of cultural differences and confusion over ethnographic methods, and the challenge of finding the right rhythm between close interaction and useful separation, between client-emic perspectives and the desire to perform magic. Focusing on these challenging situations we can now sketch a few lessons for ethnographers and clients alike who engage in similar forms of interactions.

First, and not surprisingly, in a highly collaborative format expectations and roles need to be clearly communicated, aligned and defined, initially and throughout the project. It is essential to clarify who makes the final decisions and to ensure a mutual understanding of whether or not clients should participate in and decide upon all aspects of the process. While shared responsibility will guarantee necessary discussions, ultimate decision making power should probably rest with one party only.

Second, clients cannot become ethnographers over night and will require training and coaching for the steps they take part in. It is also important to not underestimate the different cultural dispositions between ethnographic consultants and clients. Consultants need to make their processes very explicit as clients need to know at each step where they are, what the goals are, and what is expected from them. In addition, interpretive analysis can be a scary and confusing experience for non-ethnographers if that territory is not domesticated for them. Moreover, in a situation were client and consultant team members use language differently while arguing for their positions, tangible tools and models can prove to be valuable means for creating a shared platform of understanding. This also means that embedded client-consultant teams require additional resources to train team members, define and communicate the process and have time to discuss the approach and results.

Third, despite the valuable goals to share as much as possible during such a project, from research to analysis and concept development, for consultants it is of great importance to take some time away to find the right rhythm between closeness and distance, client-etic and client-emic perspectives. Both states have value and are important for building a productive relationship. Thus clients need to recognize that external consultants are valuable in part because they have an outside perspective and can help the organization see things differently. However, it is similarly important to invite our clients into the secrets of our seemingly magic production in order to anchor our work. For the client it is important "to be together [with consultants] the whole way"—and that the consultancy "acknowledges that when they are gone the project members are going to be responsible for the future presentation of the results". By teaching the client the ethnographic and consulting tricks, we can show them the real value of ethnographic encounters. Brilliant insights that are not understood and therefore untouchable are like expensive pieces of jewelry that cannot be worn in public. The challenge lies in finding the right rhythm and proper balance between working together and thinking separately in order to be able to both advise and analyse.

Anthropology is traditionally about making sense of other people's worlds. Anthropologists and ethnographers have long-established and fine-tuned methods and theories for uncovering people's practices and tacit assumptions. For us it became evident that there is a need for applying our methods more intensely towards making sense of our own worlds and the work we do, to analyse our work interactions with clients and our professional assumptions and values. (Hylland-Eriksen 2006) If anthropology is a tool for cultural critique this includes the critical reflection of the culture of ethnographic consultants. (Marcus and Fischer 1986) In the last decade ethnographic consulting practice has developed intricate processes to conduct relevant user research, perform deep analysis and develop innovative strategies and concepts. In difficult times with demands for a stronger client focus, we need to make sure that our processes and structures to understand our clients and ourselves and work collaboratively with them are at least as developed.

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