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**Emerging Models  
of Consultancy**

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## EMERGING MODELS OF CONSULTANCY

"Men's activity is theory and practice;  
it is reflection and action."

Paul Freire

While management consultancy has been a major field of endeavor for a very long time (A.C.M.E., 1954), it has recently grown to become increasingly professional, studied, and conceptualized, e.g., Greiner and Metzger (1983), Gullessich (1982), Blake and Mouton (1976), and in the process has inevitably become more differentiated as well. In part, this differentiation is the result of specialization by consultants--especially in terms of services offered and client systems focused upon. We are just beginning to recognize consultant-client relationships and roles that have emerged in response to the increasing sophistication of managers and growing organizational interdependencies. These relationships are nurtured by turbulent organizational environments, as well as significant shifts in how inquiry is carried out. In addition, fundamental changes in the guiding metaphors of organizations (Jelinek, et al., 1983) have impacted client-consultant relations. In this exploratory paper, we attempt to explicate what currently appears to be the range and function of emerging consultancy models, that is, to order and describe the major contemporary consultancy models in terms of consultant roles.

The significance of this endeavor is primarily two-fold. On the one hand, we hope to stimulate further the discussion and study of evolving consultancy models. On the other hand, we hope to alert consultants and clients alike to some of the newer consultancy roles and their functions.

The explication of consultancy models will proceed as follows: first, three major previously identified models of consultancy are described and comparatively discussed; second, changing contemporary conditions of organizations, their environmental situations, and changing inquiry practices are briefly characterized and the implications for consulting noted; third, three emerging consultancy models that extend prior conceptions are outlined; and last, we speculate on consultancy model development as further evolution occurs.

### THE KNOWN MODELS OF CONSULTANCY

Three major consultancy models have previously been identified (Lundberg, 1977). The first and earliest model is the doctor-patient model. Here, clients typically feel rather helpless and/or ignorant and seek a knowing powerful ally to "heal" them (Lundberg, 1984). Clients essentially give themselves over to the care of the consultant for diagnosis and prescription. The consultant in this situation usually takes a generalist view, probing for the "real" problems (often complex and touching many parts of the system) and is concerned with making recommendations.

The second consultancy model is the expert supplier-purchaser one. Here, clients believe they have identified a need or problem which requires attention but they choose to go outside of the system and contract for assistance. What is desired from consultants is their expertise, whether technical, scientific, or managerial. Consultants, predictably, are specialists in something, e.g., compensation schemes, information systems, goal-setting, and so forth. In general, clients

hope to achieve efficiency or rationality in their management systems by utilizing these system architects. One modern sub-type of the expert supplier-purchase consultant has been labeled the "mental adventurer" by Nees and Greiner (1983). These are the whiz kids or scientists of consulting who love to aim their expertise at those difficult and well-defined but novel questions that exist beyond the boundaries of the client organization.

The third major consultancy model previously identified is the facilitator-participant model. The essence of the client-consultant relationship is that it is collaborative. Both parties explore and learn together about the clients' problems and what can be done about them. The consultant has an expertise, but it is in the problem solving process rather than in the content or substance of the problem. The two best known examples of the facilitator consultant are organizational development consultants (Lundberg, 1977) and what Nees and Greiner (1983) call the friendly co-pilot. The former tends to be long-term and focus upon organizational change and renewal very much under the ongoing control of the client. The latter are consultants who provide an experienced sounding board to Chief Executive Officers on a continuing basis.

These three major consultancy models specify quite different roles for both consultant and client. Table I summarizes eight dimensions on which the three consulting roles differ. Of note are the differences in status and orientation of the client roles to those of the consultants. In the doctor-patient model clients carry subordinate status, feeling helpless and/or ignorant. In the expert supplier-purchaser model, the client occupies the superior status and his or her orientation is of

being aware, resourceful, and self-helping. In the facilitator-participant model, clients are peers, sharing responsibilities with the consultant for being knowers and learners.

These three known models of consultancy each emerged in response to changing conditions and organizational managements' consciousness of different needs for assistance. They do not serve simply as replacements for one another, yet they have provided alternatives from which management could select. In recent years, however, organizational conditions have continued to change, demanding new forms of consultant roles and functions. It is to these contemporary conditions we now turn.

#### EMERGING ORGANIZATIONAL CONDITIONS

Changes in organizational conditions of all kinds are becoming more frequent. In part, this can be attributed to several contemporary and paralleling revolutions, e.g., technological, informational, and logistical; major changes in social values; increasing environmental uncertainty and turbulence; demographic and generational imbalances; new ideas and methods about appropriate management, as well as resource constraints and inventions (e.g., Drucker, 1969; Roeber, 1973; Emery and Trist, 1973; Naisbitt, 1982). While the focus and space constraints of this paper prohibit an exhaustive discussion of contemporary organizational environments and modern organizational issues, several factors should be mentioned by way of sketching the demand characteristics for three recently emerging consultancy models. Five such

TABLE I. CONSULTANT ROLES: KNOWN MODELS

<u>COMPARISON DIMENSIONS</u>	<u>DOCTOR</u>	<u>EXPERT SUPPLIER</u>	<u>FACILITATOR</u>
STATUS	SUPERIOR	SUBORDINATE	PEER
ORIENTATION	POWERFUL AND KNOWING	KNOWLEDGEABLE	SKILLFUL BUT LEARNS
MAJOR EXPERTISE	GENERAL MANAGERIAL	SPECIALIST-TECHNICAL	PROCESS SKILLS
TIME SPAN OF CONTRACT	MEDIUM (UP TO A FEW MONTHS)	SHORTER (UP TO A FEW WEEKS)	LONGER (UP TO A FEW YEARS)
PRIME VALUES	ECONOMIC EFFECTIVENESS	TECHNICAL-RATIONAL EFFICIENCY	HUMANISTIC
TIME ORIENTATION	PAST (CORRECTIVE OF)	PRESENT	FUTURE (ANTICIPATED)
FOCUS OF WORK	PROBLEM DIAGNOSIS	PROBLEM SOLUTIONS	IMPLEMENTATION
MAJOR OUTCOMES	RECOMMENDATIONS	NEW PROGRAMS	CHANGE UNDER WAY



environmental conditions are noteworthy, even if already widely acknowledged.

First, we have been overwhelmed in recent years by the fact that we live in an everchanging world. While change has always existed, it is the astonishing rate of change which is causing difficulties in organizations. At the present time, many organizational domains may be termed turbulent, that is, increasingly complex and changing.

Second, interdependencies among organizations have also increased. These are believed to reflect a number of other changes, e.g., wider marketing areas, more subcontracting, governmental and environmental regulations, and the growing costs of capital, energy, labor.

The third condition has to do with how organizations are understood fundamentally. The earliest metaphor of the organization as a machine gave way in the 1950s and 1960s to the metaphor of the organization as an organism. In this process, the almost exclusively technical-rational view was supplanted by the contingent and systems perspective which is still dominant. In recent years, however, a third major organizational metaphor is gaining support. It classifies organizations, as cultures. Industry, organization, and subunit cultures have brought about a concern with "meaning," its creation and dissemination.<sup>1</sup>

The fourth and fifth conditions are highly interrelated. Here we refer to the technological and informational revolutions. On the one hand, technological developments in energy, manufacturing, medicine, agriculture--in nearly all walks of life--have altered previous skill levels in occupations, intensified capital requirements, created new vocations, and raised the rate of innovation. On the other hand, computing and communicating technological developments have prompted the

information revolution. Today we can gather, store, manipulate, access, analyze, send, and display information as never before.

What are the implications of these modern conditions for organizations? There are many of course, but in general they seem to require that organizations become much more future-oriented than ever before; that they become more flexible, adaptive and anticipative than ever before; and that they become clearer on what they are and what they do. It is clear that complex systems, and that's what modern organizations are becoming, require complex analysis.

Paralleling changing environmental and organizational conditions are two other changes. One concerns our understanding of how inquiry proceeds. Not so long ago inquiry in science and in organizations was reductionistic and analytical. Complex problems were disaggregated into their parts. Cause and effect thinking predominated. In contrast, modern scientific inquiry counsels that reality is partially the construction of the investigator; that the process of inquiry usually impacts that which is studied; and, that the whole is truly something more than the sum of its parts. In addition, behavioral science now more often seeks to uncover the assumptions and values that underlay observable actions (Mitroff and Emshoff, 1979). The work of organizational scientists and managers alike reflect these shifts in how problems and phenomena are understood. Consultants, too, have been affected in how they use theory, practice the art of inquiry, and relate to their clients.

#### EMERGING CONSULTANCY MODELS

As organizational management has had to face the sort of conditions and changes sketched above it has become more concerned with longer-

range planning and strategizing as well as futurizing. The need for new ways of organizing and managing as well as continuously renewing and changing has expanded the demand for new and different consulting services. Three identifiable forms of consultancy are emerging.

#### Organizational Visioning

One new consulting service assists an organization in identifying and refining its vision of itself in the future. Here the client system seeks to anticipate future conditions and create an appropriate image of itself within that future. The presumption is that having a reasonably clear vision of itself will enable it to proactively make the vision become reality. Consultants who serve visioning functions bring process and futurizing expertise to the task. They use their ability to help clients access the growing body of technological forecasts and projections available. Visioning involves the generation of new value systems as well as new technological systems. The visioning consultant attempts to help the client organization recognize that values and technology must evolve into the future in an integrated manner. If one outpaces the other, a schism results that contributes to organizational distress.

The typical visioning consultant tends to work intensively with top management and staff personnel over a few months' period with ongoing periodic contact thereafter. Vision enhancement consultants in some instances can be seen as extensions of existing strategic planning specialists.<sup>2</sup> Whereas long-range planners look forward two to five years, organizational visioning consultants look toward the five to twenty years' horizon.

#### Organizational Reframing

Given the turbulence, complexity, and developmental conditions which many organizations face, it is no surprise that consultants have emerged whose prime service to their clients is reframing, that is, creating new and more appropriate socially-constructed systems of shared meaning.<sup>3</sup> Here the task is to shape a conception of the organizations' culture (Pettigrew, 1979; Fortune, 1983) or of the organizational paradigm (Brown, 1978; Mohrman and Lawler, 1983; Pfeffer, 1981). Clarification of the system of shared meaning ostensibly facilitates efficient communications and provides a distinctive identity that improves organizational performance. Clarification also serves to sharpen organizational domains and issues. The reframing consultant helps the client focus on the present and near future. Tasks dictated by this consultancy model may include corporate mission redefinition, stakeholder analysis, assumption surfacing, metaphoric redefinition of the organization and its functions, and confrontation of habitual or poorly thought-out business practices.

#### Adaptive Organizational Experimentation

While organizational theories abound, almost all are inadequately tested, have little cumulative evidence, and are not very powerful in predicting organization or member action. In recognition of this lack of theoretical potency, another new form of consultancy is appearing--a consultancy in which clients and consultants team up in an ongoing research endeavor to redesign and monitor multiple changes. This work is intended to enhance organizational adaption by means of experimentation.<sup>4</sup> It assumes the weakness of both theory and the designs of others; rather it fosters carefully grounded, individualized redesign which is based upon ongoing research-based processes. Clients

and consultants become the prime stakeholders in long-term linked research and redesign teams. They share perspectives, rely mostly on qualitative data, and focus on their mutual learning. The key to this form of consultancy is the involvement of the parties in a relationship in which they proactively reduce communication distortions. Consultants bring field research and relational competencies to the relationship and help their clients learn from careful experimentation. Quality of work life, and industrial democracy projects are examples of this newest form of consulting.

Table II sketches some of the ways these emerging consultant roles differ from one another--using the same comparison dimensions as in Table I. We note that these consultancy roles, as compared to the known ones, possess quite different orientations, bases of expertise, values and focus of work. The emerging models have not developed in isolation. They share roots in the more conventional models. They also share an evolutionary path that parallels the demands of accelerating complexity within organizational environments and changes in how inquiry occurs. These three models are "emerging," that is, they are not as yet very well codified, and, therefore, the information of Table II is necessarily tentative at best.

#### CONSULTANCY IN THE FUTURE

If, as has been suggested, the three emerging models of consultancy are in fact in the process of becoming more practiced and acknowledged, how might they appear in the future? The three models described as "known" continue to exist. On occasion, they appear in combinations and

even blended together. Even more common is that these known consultancy models have frequently become incorporated into the organization-- either as internal staff roles or as ongoing responsibilities of operating managers. At present, the three "emerging" models of consultancy are mostly practiced by external consultants, more and more often as teams.

The three emerging models may continue to diverge onto distinctly different paths. The most probable next step in the continuing evolution of consulting, we believe, will be one of synthesis. We predict that in the near future all consultancy models will continue as distinct, but, that the three emerging ones will converge onto a single path which embodies significant features of each. Most likely, adaptive experimentation will subsume both visioning and reframing.

This synthesis will contribute to a consultancy model in which future searches and values reflective flexibility. Knowing the present in new ways, redesigning the future, and being bold enough to reflectively learn from each step taken on a path--these may be necessary survival skills for increasingly complex individuals and organizational systems in an increasing complex environment.

TABLE II. CONSULTANT ROLES: EMERGING MODELS

<u>COMPARISON DIMENSIONS</u>	<u>VISIONING</u>	<u>REFRAMING</u>	<u>ADAPTIVE EXPERIMENTATION</u>
STATUS	PEER	SUPERIOR	PEER
ORIENTATION	ESOTERIC KNOWLEDGE	CONFRONTATION	MUTUAL LEARNING
MAJOR EXPERTISE	FUTURIZING	MEANING CREATION	COLLABORATION
TIME SPAN OF CONTRACT	SHORTER (UP TO A FEW MONTHS)	MEDIUM (UP TO A YEAR)	LONGER (UP TO A FEW YEARS)
PRIME VALUES	ANTICIPATION	CLARIFICATION	EXPERIMENTATION
TIME ORIENTATION	DISTANT FUTURE	NEAR FUTURE	PRESENT
FOCUS OF WORK	UNCERTAINTY REDUCTION	OBTAINING A NEW PERSPECTIVE	RESEARCH AND INTERVENTION
MAJOR OUTCOMES	FUTURE DESIGNED	NEW IMAGE	ONGOING MULTILEVEL CHANGE

## CONCLUDING COMMENTARY

This paper has attempted to explicate three consultancy models that are emerging in response to changing organizational conditions and inquiry processes. In contrast to those consultancy models we are familiar with from the past, the emerging models require the enactment of quite different roles and functions. Organizations are increasingly complex and require increasingly complex theory and practice. Consulting activities must also respond to this increasing complexity through new models of reflection and action. While only time and experience will confirm the viability of these emerging models, as well as further delineate them, this paper has focused attention upon them in the hopes that further discussion and inquiry will hasten their clarification.



## FOOTNOTES

1. Here we note as evidence the growing literature that discusses organizational folklore, sagas, stories and myths as well as the literature on corporate and organizational culture per se.
2. The term "visioning" is borrowed from Russell Ackoff (1979) although his use of the term is not ours.
3. "Reframing" (Watzlawick, Weaklund and Fisch, 1974) occurs when relational frames are changed by resorting to some higher logical level (a frame of frames) or by having externals to infraorganizational relationships help to replace the existing frame with a new one.
4. This seems to parallel what Lawler (1977) outlined for organizational behavior research, and the collaborative, action-research strategy of Cummings, et al. (1983).

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