PRESENTATIONS

How Consultants Project Expertise and Learn at the Same Time

by Alaric Bourgoin and Jean-Francois Harvey

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Young management consultants may be novices, but they're sold as experts. Conversely, even experienced consultants, who legitimately present themselves as experts, still feel like novices when they embark on a new project.

The challenge with effective consulting is that it depends on in-depth situational knowledge that consultants simply can't have when they start an assignment. What's more, they may not yet be completely clear on what the client — who's paying top dollar and expects results immediately — really wants. So consultants must rapidly and discreetly gain knowledge of the client's business while simultaneously giving an impression of competence and self-confidence. We call this challenge *learning-credibility tension*.

How do consultants overcome it?

Consultancy Work Is a Performance

For consultants, work is largely a performance. Like skillful actors, they use a combination of "backstage" preparation and "front stage" performance to make the audience (that is, the client) believe the story they want to tell.

Consultants are sometimes accused of trying to hoodwink their clients with smoke and mirrors, using management fashions or buzzwords for their own benefit. But our research suggests that they are far from being arch manipulators who control every interaction. Instead, they are doing everything they can to learn and deliver value at the same time, under the constant risk of failure.

The obvious way to gain knowledge is to ask direct questions. But if consultants try that, they risk looking uninformed or just useless. Clients might reason, "*We* shouldn't have to train *you*!"

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Experimentation could be another fruitful approach. But when leaders hire an expert to take on a challenging task, they don't expect the person to try things out. They expect the expert to just know what to do.

Consultants can also attempt to display knowledge right away. But if they make a mistake that reveals their ignorance, they could look incompetent. If things go wrong later, the client might lose faith in the consultant's expertise, making it even harder for them to deliver.

In other words, consultants really are faking it 'til they make it — or, more precisely, faking it *so that they can make it*. Their fakery is not cynical, but sincere.

We studied management consulting projects for almost two years and interviewed 79 consultants to understand how learning-credibility tension manifests in practice and how consultants deal with it. What we found is that consultants use a range of verbal and nonverbal tactics that help them manage perceptions and neutralize threats to their professional image.

Consultants deal with three types of threats to their self-image: competence threats, acceptance threats, and productivity threats. To neutralize them, they use three closely related tactics: *crafting relevance*, *crafting resonance*, and *crafting substance*. Let's look at them in turn.

Crafting Relevance to Seem Competent While Learning

Consultants are usually hired to advise on business transformation, project management, or strategy. However, they must also show that they adequately understand the technical side of their assignments. In other words, they face competence threats, which they deal with by *crafting relevance*.

Crafting relevance is about having the maximum impact in the minimum time by leveraging all the bits of knowledge that are available. Consultants don't have to know it all — just enough to be taken seriously and appear competent while they seek more information.

One way to do this is to collect nuggets of information and selectively present them back to clients. The information might come from written material on past consulting assignments, the client's internal documents, or information in the public domain. By preparing thoroughly and using these nuggets to create a mental map, consultants start to build a high-level view of the client's situation.

The other way consultants craft relevance is by approximating past experiences — that is, by telling stories from past assignments that have some parallel with the problem at hand. Backstage, they search their track record (or their colleagues') for experiences that echo the current assignment. Then they bring them up in conversation with the client, perhaps pointing to their own contribution. This preserves face while encouraging the client to share more details.

Of course, clients know very well that their consultant hasn't really learned an entire technical field in a matter of days. But they still appreciate that they've done their homework. For their part, consultants use crafting relevance to develop just enough expertise for them to interact with clients, with or without the ability to execute.

Crafting Resonance by Recycling Insider Knowledge

Clients must accept consultants as fellow professionals before they will follow their advice. But it's hard for a newcomer to fit in straight away, because it takes time to appreciate "how we do things around here." This exposes consultants to *acceptance threats*, which they deal with by *crafting resonance*: recycling insider knowledge to gain acceptance while acquiring new information.

Clever Hans was a horse who tapped his hoof to signal the answer to arithmetic questions. Of course, Hans couldn't really do math. He simply watched his trainer for cues that he'd given the right answer.

Similarly, consultants monitor their clients for physical approval cues (such as facial expression or body posture) or the words and phrases they use, which often have special resonance. For instance, lawyers from a top firm responded positively to Latin expressions, as they were part of legal work culture and showed intellectual sophistication. So consultants would rehearse these expressions backstage, and then use them in conversations to show that they knew their Latin too, fostering acceptance. Having picked up these expressions, consultants can say the things that clients want to hear, allowing them to fit in despite being outsiders and triggering more engagement during their exchanges.

Second, consultants borrow internal insights from client staff, and then recycle them by presenting them as their own when they're with other insiders. Some might say this is the sort of thing that gives consultants a bad name — people who "borrow your watch to tell you the time, then walk off with the watch." But it's more than just a confidence trick. By watching how people react to their borrowed judgments, consultants can discover which ideas (and people) have support within the organization and choose to amplify them. This can help them tackle "wicked" problems where there are no simple or clear-cut answers.

Crafting Substance by Creating Knowledge Objects

Consultancy services are usually expensive, so clients are concerned with getting value for money in the short term. But it usually takes consultants a while to get up to speed and deliver their highest-value output. In the meantime, the client may question their value add, exposing them to productivity threats. They deal with this using the third and final tactic: *crafting substance*. This is about creating knowledge objects to display productivity while seeking information at the same time.

The first way to craft substance is by manufacturing PowerPoint figures. While PowerPoint has a mixed reputation, it's an indispensable tool for consultants to impress their clients with clear thinking, deep understanding, and task progress. Furthermore, PowerPoint figures also serve as prompts that elicit feedback on technical points — with the added bonus that any criticism is directed toward the figure rather than the consultants themselves.

Consultants often use ideographs, combinations of text and images, to express important ideas, and many consulting firms maintain a library of readymade templates to help consultants create their figures quickly and easily. These provide them with a sort of plug-and-play thinking, allowing them to quickly make sense of a situation, boil it down to its essentials, and communicate it.

Sometimes, client organizations already know the answers to their problems, but still can't articulate them — which means they can't act on them. By providing powerful ideographs that clients can't create for themselves due to lack of time or resources, consultants can make a telling and visible contribution.

The second method of crafting substance is by tendering activity proofs such as timesheets and workload schedules. As well as giving an impression of control and professionalism, they can help draw out what the client expects, which can be a movable feast. They can also function as protective amulets to ward off clients' anger at a perceived lack of progress.

Putting your ideas out there in a tangible, stable form is a risk. But it's a risk that consultants must take, however little they know about the business context, because it shows clients that consultants are committed to the project and are providing value for the money. However, it also helps consultants build their understanding of the new setting, and creates a formal space for feedback on the assignment.

Many People Manage Learning-Credibility Tension

We studied how consultants manage learning-credibility tension. But many others must deal with it too, including temporary staff, project team members, analysts, professional advisers, and freelancers. These workers are not just optional extras; they make a crucial contribution to many organizations. No wonder global executives believe they will be in high demand for years to come. Besides, managers in general can also be included in this group — they are sometimes thought to be a kind of "consultant" themselves.

Like consultants, all of these types of workers have to adapt to a different setting with each new client or project and grapple with dynamic, hard-to-grasp problems from day one. They have to prepare carefully, establish their competence, understand the environment, and cultivate acceptance from new colleagues or clients, often by producing deliverables. And they may have to do all this without any backup from a consultancy firm.

Fortunately, anyone can use the tactics we've described, not just consultants. Learn to use them successfully, and you can build confidence, feel better about your work, and maintain your face.

However, managing learning-credibility tension is something much deeper than "personal PR" or acting out a role. It will also help you to gain new insights, share information, and work toward longer-term goals. After all, without belief and acceptance from those around you, your important new project will never get off the ground.

Given how chaotic and unpredictable working life can be, it's not surprising that more and more people are falling prey to impostor syndrome, the fear that you're not up to the task and will be found out. For most workers today, that feeling is ever-present.

However, when you reframe feeling impostor syndrome as managing learning-credibility tension, you turn it from a psychological flaw into a vital skill. In our research, we found that consultants don't just have impostor syndrome, they actively embrace it – because it keeps them sharp and on the edge, where they need to be.

Alaric Bourgoin is Assistant Professor at HEC Montréal. His main research interests include management consulting, value, and power — themes that he tackles through a pragmatist lens. In 2015, he published *Les Équilibristes* (*The Tightrope Walkers*), in which he discusses the valuation practices of business consultants.

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13 COMMENTS

Mantas Pupinis 2 months ago

A great article! It resonated a lot with my experience as a consultant. I agree with a risk for the client observed in the comment below by Tudor Galan. The client may not be able to assess the real competence of a consultant if he/she is a really good performer/seller/faker. Therefore, consultants and consulting companies must follow certain principles of operating and recruiting:
- Senior consultants and managers must make sure to hire only highly ethical young consultants and develop tools to assess their ethics. Since consultants usually jump from topic to topic (even if the topics are related), they will almost never be better experts than the client (at least in the beginning of service provision). This means that the consultant should consciously strive to learn as fast as possible, so that he/she is able to provide best quality services ASAP.
- This also means that only very bright and ethical people should enter consulting. They should be able to learn extremely quickly, connect the dots about insights from different industries and areas, have very strong analytical and problem-solving skills.

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