

Success factors and challenges in information consultancy – the client perspective

by Irene Wormell & Annie Joan Olesen



During the years 2000-2006 professor Irene Wormell was teaching Information Management at Bibliotekshögskolan in Borås. Nowadays she is working in her own business Informatiker Konsult AB, Malmö. She has always tried to widen professional horizons and develop librarians' competence in entrepreneurship and consultancy.

Annie Joan Olesen is also an information service consultant and is working for the Danish consultant firm A9 Consulting ApS. Like her co-writer she is a member of this journal's editorial board.

This study gives a closer look at what makes information consultants successful and how they develop a productive relationship with their clients. In the first part of the study the focus was on the consultant. In this second part we let the client speak. The study collected empirical data in the form of interviews and questionnaires distributed in Denmark, Canada, Hungary, Sweden and Iceland. The responses and comments shed intriguing light on the process of successful cooperation between consultants and clients.

This study is the last part of a series of informal studies which have been conducted in various countries to get a deeper insight into the relation of information consultants and their clients. Beside expertise and technical skill there are many other qualities which make a successful consulting engagement. It became more and more clear during the study that a successful consulting assignment also requires careful management of the interaction between client and consultant. This is often a complex issue, involving a great deal of psychological insight and social competence.

The initiative came from two international consultants: Annie Joan Olesen who is working for the Danish consulting firm A9 Consulting ApS and Ulla de Stricker working for de Stricker Associates in Canada. They were curious to find out "What is it we do right? What qualities make us successful? What skills do we need to improve?"

In the first part of the study they let the consultants speak.

Through questionnaires and a series of interviews with independent providers of information services and information consultants working in full-range consulting firms they collected many valuable comments relevant for skill building for career in this area e.g.,

- 1). WHAT and HOW of a service agreement
- 2). Interacting with the client's staff
- 3). Dealing with organisational culture

The findings were presented at the annual meeting of the Consulting Section of SLA's Leadership and Management Division in Toronto in June 2005. Also an article has been published in InfoTrend 60(2005)3.pp.87-90,

“Consultants and their clients. Highlights of a study of success factors in information consulting”.

How the study came about

In this second part of the study we let the clients speak. Irene Wormell, Informatiker Konsult AB, used her professional network for interviews and for the distribution of questionnaires in Hungary, Sweden and Iceland. Our client informants shed intriguing light on the process by which the engagement between client and consultant gets established and progress to the stage of “deliveries”.

A questionnaire in English were addressed to business managers, distributed personally through information consultants to their own clients. In Hungary, the Hungarian Association of Information Brokers, MIBE (Magyar Információs Brókerek Egyesülete) has taken a very active role in collecting data from their clients. To reduce the language barriers the questionnaire has been translated to Hungarian.

From Iceland we have received two responses, with rich content - many useful comments and good advice.

In Sweden 28 questionnaires have been sent out which in several cases were followed up by personal contacts and phone calls. In spite of this effort the Swedish response was rather poor. This can be explained partly by the existing differences in the interpretation of the expression “information consultant” and in the tradition between international and Swedish praxis. We have tried to explain that in this study the “consultant” role is meant as expert help, rather than a form of independent working. In Sweden special librarians are often functioning as “consultants” in their own environment, therefore, asking their clients to answer the questionnaire should not have been so difficult. Unfortunately only a few did so. However repetitive contacts and follow up activities resulted in many verbal comments

which are also included in the analysis.

In the following we are giving some examples to illustrate the character of full responses or a composite of several comments making the same point. This is an expose of the responses, there is need for a deeper analysis and structuring of the findings. The key concerns from part 1 and 2 of the study will be merged and structured in a form suitable for training and skill building. It is our hope that in the near future we can get support for publishing the material and make it available for information consultants who really want to “Go for it!”

In the interviews and the questionnaires we have asked the clients about the following issues:

1. Situation, need and motivation for contacting a consultant.
2. How to find a suitable consultant
3. Impression of the process of working with the consultant
4. Experiences and lessons to be learned
5. “Top five” list of qualities and characteristics of a consultant
6. Advice to colleagues looking for help from an information consultant.

What the clients say

By listing some of the responses we aim to point to examples which illustrate the type of concerns voiced. The examples are not a comprehensive inventory. The collected material shed intriguing light on processes and situations and it provides a much more detailed information about the “success factors in information consulting”.

1. Motivation

- “I was attacked by hostile media. I sought an extern, independent assistance in searching for relevant and quality assured

information which could be used also in the legal procedure.”

- “I had problems with finding and selecting relevant information from the sources offered by the Internet.”
- “I was looking for new strategic directions and wanted to get access to new and innovative ‘ideas’”.
- “As we needed help in Hungary and nobody in the company had the necessary skills, we chose a Hungarian consultant.”
- “Our file management system was not working as it should and it was not user friendly. We needed to reconstruct the system and our thinking and adopt the life cycle idea.”

2. How to find the right consultant

- “I asked my private and business contacts about a reliable professional consultant. Finally, I got contact with him by phone.”
- “I met him personally at a conference. We immediately established a good relationship.

My main requests were:

- capability to access and structure the relevant information
- balance of price/value
- good personal relations
- fair and correct accounting
- flexibility
- problem solving capability
- reliability”
- “I was not particularly looking for an information consultant, but I knew this one well and I remembered that he was always telling me interesting news, trends etc. I

thought that he could be a useful partner for me in the current strategy development.”

- “Through contacts and web site.”
- “The aim was to get an expert with good reputation.”
- “These types of services could be much more used with more and better marketing and efficient distribution of information materials. One might also use the copyright sign to indicate that this material or result is based on the work of a certain consultant. This is also important if the client wants to use the material in the future for reference.”

3. The process of working together

Getting the consultant oriented

- “He managed to find time rather quickly for a first meeting. I was very satisfied with him from the beginning, because I felt that he gave time and effort to learn about my problem. Throughout the communication process I enjoyed very much to talk to somebody who treated my ‘individual’ problem with a professional attitude, great concern and empathy.”
- “Since it was not one particular problem that we worked on, but rather to find out the optimal way for an effective and quality assured information collection for my area of interest, our contacts were, and still are, going on continuously in the form of discussions, giving advice and tutoring.”
- “He was always good at asking me relevant questions and to give feed-back.”
- “It was of great importance to be clear,

and assure that the consultant really knew the issue. We devoted some time for that, and it worked out well.”

Determining the strategy for the work in the project

- “Together we made a timeframe for the selection of data/info, as well as for the type of media and sources to be used. I asked him to think openly and widely, and help me to see new aspects and perspectives around the given problem. I asked him to be provocative against my own statements.”
- “We devoted one day for planning, and the strategy was included.”
- “Continuous contacts and discussions.”
- “I did not feel any special about it.”
- “All worked out very well.”

The actual work as it progressed

- “We kept contact by phone and personal meetings during all phases of the work. He delivered the collected information in time, and during personal meetings we discussed and evaluated the issues.”
- “We stuck to the time schedule and the activities planned for, not much changes due to a careful planning.”
- “The work progressed as it should (by continuous contacts).”
- “I could follow the work process, and it was to my satisfaction.”
- “It was a challenging task.”

The interaction and communication with the consultant, and between staff and the consultant

- “Phone, personal contacts, e-mail. Depending on the situation, the character of the problem to be discussed, and the practical conditions.”
- “Worked out well, of importance was among other things the proper introduction of the consultant to the organisation.”
- “It was a good communication all the time between the consultant and me (and my staff).”
- “Worked out very well.”

The deliverables and their effect

- “Both the data and information, relevant to the period of time and media, have been delivered in accordance with our agreement. I felt that the material was a bit ‘different’ from what I had in my mind, but, at the same time I thought : ‘... the whole idea with this external and professional contact was to get something new in my mind!’ Thus, this little surprise, it was the most important result, and the help I was looking for.”
- “We had a good result of our cooperation. It was a challenge for me that sometimes I didn’t get immediate answer to important questions or I had to ask explicitly to get feed back for particular problems. I learned that it is not so easy to dig out the ‘exact’ information!”
- “I used some parts of the results. The real effect and value of this contact will be measured by the success of the company.”

- “The deliverables were agreed on beforehand. The major challenge was to sell in the concept in the organisation.”
- “We didn’t really follow up, but will do so in the future.”

4. *If you have to do it again*

- “I would do it in the same way, because the result could not be better.”
- “We have succeeded rather well in determining the frame and the volume of the material examined.”
- “I should like to offer more time and attention to formulate more precisely what my expectation is, how can I control and check the results. I think that it is important to find out the way how to get the information broker really interested and involved in your problem, because, in that case he is better serving your interests.”
- “I should like to make the procedure more simple.”
- “I would have given more time to the ‘selling-in’ of the concept”.

5. *The “top five” list of qualities*

- “Goal oriented; professional; quick; objective; possible to refer to (e.g., in legal context).”
- “Professionalism; communication skills; ability for cooperation; problem solving capabilities; reliability.”
- “Quickness; alertness and capability to understand the problem in detail; engagement and participation in one’s problem;

express himself in clear and common language terms; goal oriented.”

- “No delays in communications; right price; good payment routines.”
- “Experience and competence within the actual area; creativeness and discipline in combination; an understanding of the organisation, or a learning ability to understand the organisation; good manners, selling ability; keep promises, time plan, deliverables.”
- “The consultant’s knowledge, motivation and patience.”
- “The consultant who I am thinking of just needed one improvement: a little more ability to listen.”

6. *Advices for future clients*

- “To be assured that the consultant properly has understood the problem and is starting and conducting his work in the right direction. This saves time and money, and it helps to avoid empty loops and frustrations.”
- “Precise definition of the task, deadlines and results. Furthermore, thinking about the development and maintenance of a “strong interest” in the project on the part of the consultant.”
- “To be well aware of what kind of help you are expecting from the consultant.”
- “The choice/selection of consultant is important. There is a need for a professional forum where the consultants can be registered and the client has the guarantee to find a competent and reliable person to work with.”

- “In our case we find a good consultant, thanks to the recommendations of our friends.”
- “But what is the chance of all the others (without these contacts) finding the ‘right’ consultant?”
- “Do not hesitate to get help, it makes the work so much easier.”
- “Go for it!”
- “Just do it, it saves time and money .“

The following questionnaire was addressed to the clients. We welcomed all other commentaries also. We informed them that we intend to prepare a “guidance document” for the consulting community as a support of its professional development.

1. Can you briefly characterize the situation(s) in which you have sought the assistance of an information consultant?
2. How did you then go about finding a suitable consultant, and what were some key “features” you were looking for in particular?
3. What was your impression of the process of working with the consultant(s)? If you think of the various aspects of the project, perhaps you could comment on “what worked well” and “what was challenging” in each.
4. If you had to do it again, or a new project gets established, what would you do in the same way or differently as a result of your

experience, and why?

5. What would be on your “top five” list of qualities and characteristics on the part of a consultant that make for good value and quality?
6. Similarly, what elements do you feel could be improved?
7. In summary, what would be your advice to colleagues looking for help from an information consultant?

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