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### The Role of Relational Expertise in Professional Service Delivery

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# The Role of Relational Expertise in Professional Service Delivery

## Abstract

[Excerpt] The service organization has become the literal mainstay of the U.S. economy. As the predominant form of U.S.-based business, by 1990 service organizations contributed more than 72% of our GNP (Bowen & Cummings, 1990). Yet, while service organizations have been growing in both size and significance in the United States, it was not until the 1980s that organizational researchers began to specifically examine the nature of services. Most of this research studied transactional service encounters between customers and employees, which are temporary, often impersonal, and sometimes nonrecurring interactions between consumers and many types of service providers, such as supermarket (Rafaeli, 1989) and convenience store cashiers (Sutton & Rafaeli, 1988), as well as flight attendants (Hochschild, 1983), waiters (Mars & Nicod, 1984), fast food clerks (Leidner, 1993) and bank tellers (Schneider, Parkington, & Buxton, 1980).

## Keywords

consulting, management, service professionals, expert-based service

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## Comments

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*An earlier version of this paper was presented at the 2000 Academy of Management Meeting in Toronto, Canada.*

# ***The role of relational expertise in professional service delivery***

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## ***Introduction***

The service organization has become the literal mainstay of the U.S. economy. As the predominant form of U.S.-based business, by 1990 service organizations contributed more than 72% of our GNP (Bowen & Cummings, 1990). Yet, while service organizations have been growing in both size and significance in the United States, it was not until the 1980s that organizational researchers began to specifically examine the nature of services. Most of this research studied transactional service encounters between customers and employees, which are temporary, often impersonal, and sometimes nonrecurring interactions between consumers and many types of service providers, such as supermarket (Rafaeli, 1989) and convenience store cashiers (Sutton & Rafaeli, 1988), as well as flight attendants (Hochschild, 1983), waiters (Mars & Nicod, 1984), fast food clerks (Leidner, 1993) and bank tellers (Schneider, Parkington, & Buxton, 1980).

While important to our understanding of service, transactional encounters between employees and customers represent only one dimension of service (Bowen & Jones, 1986; Gutek, 1995). To date, we understand very little about the service experience created between more professional service providers and their clients. Professional service providers, such as doctors, lawyers, accountants and consultants are acknowledged as and hired by clients as experts in their field. The relationship between

the professional and client acts as the medium for delivering this expertise. Yet ways of delivering professional services have rarely been explored. The implicit assumption is that professionals' expertise in their field alone makes them successful or unsuccessful service providers. The actual role that service delivery plays in a professional's ability to apply an expertise and build a successful practice, however, has largely been ignored.

This chapter seeks to add to our understanding of service—and specifically professional consulting service—through considering a particular approach that service professionals use to consult with and create client-based relationships. Applying concepts from gender research, this research delineates a *relational approach* to service delivery. A relational approach, as outlined by Miller and associates at the Wellesley College Stone Center for Research (cf. Jordan, Kaplan, Miller, Stiver, & Surrey, 1991; Miller, 1976, 1991; Surrey, 1987) and refined and applied to organizational research by Fletcher (1994, 1998, 1999), considers ways individuals can think and act in order to invite mutual growth and development in their interactions with others. These concepts are often examined under a gender-based, post-structuralist lens as a way of uncovering how relational ways of working are marginalized and diminished in the public sphere of organizational work (Fletcher, 1998, 1999).

Through a study of fifty service professionals working in the consulting and audit/tax practice of big five accounting firms, this research examines how both men and women use a relational approach within the infrastructure of an individually-based, patriarchal organization. The specific questions that guided this work are:

1. What does a relational approach to expert-based service delivery look like?; and
2. To what extent are such approaches related to organizational success?

The basic goal of this study is to uncover ways relational practices are used and rewarded in work. Through uncovering the ways service providers use a relational approach to provide their service, this research may help us understand one of the reasons why some professionals may be successful in their practice and why others may falter.

## ***Service Relationships***

In the 1980s organizational researchers began to examine service in general and the role of service delivery in particular. Their findings suggested that services are vastly different from manufacturing in that: (1) the product for sale is an intangible experience that cannot be possessed (Bowen & Schneider, 1988), (2) the product is simultaneously produced and consumed (Bowen & Cummings, 1990), and (3) the customer plays a key role in both creating and consuming the product for sale (Argote, 1982). Thus the customer acts as a resource, as well as co-producer, buyer, beneficiary and often product of the service (Lengnick-Hall, 1996).

## ***Current Perspective on Long-Term Service Relationships***

Professional services generally involve the creation of long-term, ongoing relationships with clients, where the intangible service is simultaneously and continuously produced and consumed. These longer-term relationships are defined by their repeated interactions that, over time, enable professionals to garner knowledge about and understanding of their clients. Ultimately, each professional service relationship is characterized by its high degrees of asset specificity or unique knowledge exchange, where both the professional and client hold specific, highly customized information about the other, and the professional has developed a keen understanding of the client's specific needs. The longer the relationship, the more knowledge they accumulate about each other. This knowledge accumulation

usually enables the professional to create a more efficient process of interacting, and eventually deliver a more effective and customized service.

Professional service experiences “create bonds of attachment and trust” where the service provider and client “become dependent on one another... This interdependence causes both provider and customer to look out for the other, because in fact the other is an important factor in one’s own success” (Guttek, 1995, pp. 17–18). The client is dependent on the provider to deliver the intended service in a way that will meet the client’s unique needs. The provider is dependent on the client not only to clearly articulate his or her needs, both initially and as they evolve, but to also speak positively of the provider to other potential clients. In fact, Guttek (1995, p. 17) claimed that in a “good” relationship, both parties are interdependent and committed to sustaining the association and are “willing to expend energy and resources to preserve the relationship.” Over time, the client and professional increase both their investment in and dependency on one another (Guttek, 1995; Winch & Schneider, 1993).

Increased levels of investment and dependency make it difficult for the client to switch providers, even when the client feels less than satisfied with the professional’s expertise.

### ***The Relationship as the Medium of Service Delivery***

Providing a professional, or as Guttek (1995) termed it “relational” (i.e., long term, mutually dependent), service means that the provider delivers some form of expertise to the client, for example, legal or strategy development advice. Yet, while the relationship between the professional and client acts as the medium for delivering this expertise, the ways in which professionals use client relationships to deliver their expertise or service are rarely mentioned in the literature. Service delivery is, in essence, implicitly assumed to be irrelevant.

Some researchers (cf. Benner, 1984; Gutek, 1995; Pierce, 1995) acknowledge that relationships with clients matter. Yet each of these perspectives offers conflicting positions about what these relationships *should* look like. Their ideas range from the argument that connecting and building a relationship with clients is an important aspect of providing professional service (Noddings, 1984) to the notion that detaching from the client, especially emotionally, and even conveying arrogance is critical to delivering professional work (Pierce, 1996). At one extreme, Noddings' (1984) ideas about the philosophy of care, as well as Benner (1984) and Benner and Wrubel's (1989) work on caring in the nursing profession, for example, discuss the criticality of connecting on both a cognitive *and* emotional level with the patient.

At the middle of the continuum, Gutek (1995) acknowledged that in delivering expertise the provider needs to create an important connection with the client that becomes the means for service delivery. Yet she views this connection or relationship as both helpful to and a hindrance in delivering this service. Gutek argued that because of their relationship, the service provider and client may fight the emotional feelings associated with their connection (such as dislike with the ways the other is behaving) and the professional works to maintain a detached but pleasant persona. In fact, Gutek suggested that emotional labor (Hochschild, 1983) is at work and argued "both customer and service provider are expected to manage the emotional aspect of their relationship and refrain from displaying their felt emotions ... whether the emotions are positive or negative." Gutek (1995, pp. 80–81) went on to suggest that, "for (service providers), emotional labor means putting aside real feelings and displaying other, sometimes less intense or blander, emotions." Thus, this view suggests that while connecting with clients is important to delivering service, the connection carries negative consequences with it that may impede the provider's ability to do so.

At the other extreme, researchers argue that more negative expressions of behaviors and emotions are useful to creating specific kinds of client relationships that enhance service delivery. The more

masculine traits of arrogance and intimidation are perceived by some clients to be signals of expertise, and in some professions, such as the law, forms of gamesmanship and dominance are encouraged behaviors (Pierce, 1996). The power balance between the professional and client shifts in favor of the professional, and in return for receiving superior expertise, the client is expected to accept and accommodate their egos (Gutek, 1995). In this instance, the client looks to the professional's arrogance as a signal of expertise. Pierce (1995), for example, termed the lawyers she studied as "rambo litigators." She explored the pressures female attorneys felt to act and not act in manners that supported these behaviors. Leidner (1993) also found that insurance salesmen were encouraged to be aggressive, dominant and manipulative when "outmaneuvering" potential prospects or clients.

### ***Key Questions and Issues***

Because the research on relationship building and service delivery runs a wide gamut in identifying seemingly conflicting ideas and behaviors, actual approaches to relationship building are worth exploring in greater detail. The confusion identified through this brief review brings to light an important question: What strategies or approaches do service professionals use to create—or not create—relationships with clients in delivering their service? Especially in the context of management consulting, it is clear that approaches to expert-based service delivery—and the role relationships with clients play—are in need of conceptual grounding and clarification. In fact, in the field of professional service firms, research on the actual process of creating and building service relationships has yet to be conducted.

### ***The Patriarchal Expert***

One area that theorizes about ways professionals should think about clients is sociological research on the professions. Research in this field suggests that professional work entails a high degree of



knowledge-based expertise (Barber, 1965; Winter, 1988). Professional work is controlled through the creation and maintenance of rigorous industry-level standards (Starbuck, 1992) and, as such, professionals enjoy high status outside the profession (Barber, 1965; Winter, 1988). In fact, professionals hold their authority over their clients and act as the unquestionable expert (Barber, 1965; Carr-Saunders & Wilson, 1941). The client needs the knowledge and through training and experience, the professional provides it. Professionals may assume they know—even better than their clients—what their clients need and desire from them. In fact, as Hanlon (1997, p. 125) argued, “the professional controls the interaction with the client and translates the clients’ desires into a professional metalanguage and/or explains to clients what is possible in their situation.” In this model, the professional holds some degree of power and control over the client.

### ***The Relational Expert***

An alternative way to consider how professionals may interact with clients is to apply concepts from gender research and consider a *power-with* model. Gender research shows that women tend to have an explicit focus on maintaining positive relationships. Inherent in this focus is a relational approach, which encourages both parties in a relationship to focus on their mutual growth and development. In fact, creating growth-enhancing relationships is a key goal of relational practice.

### ***Gender Research And Growth-Enhancing Relationships***

Research on gender shows that due to their desire to act in an equitable manner and maintain positive relationships, women tend to focus on and pay attention to their relational processes more than men (Tannen, 1990). In their relationships, research suggests that women typically adopt a greater “care perspective” (Gilligan & Attanucci, 1988), act more ethically (Barnett & Karson, 1989) and display greater “social reasoning” (Jones & Hildebeitel, 1995) and utilize more cooperative skills (Loden, 1985)

than their male counterparts. Women also tend to value building connections with others more than gaining power over them (Gilligan, 1982; Neuse, 1978) and they develop their individual selves through their relationships with others (Loden, 1985). Because processes are so important to women, they tend to support flatter organizational structures and more egalitarian work practices (Neuse, 1978; Rosener, 1990) as well.

### ***Creating Growth Enhancing Relationships***

Distinguishing such gender differences provides an initial framework for identifying what relational skills may look like. The work of the Wellesley College Stone Center for Research and, primarily, Jean Baker Miller and associates, gives flesh to (1) what these women's approaches and views mean in terms of building and maintaining strong or growth-enhancing relationships, and (2) the value of these relationships to an individual's psychological growth and development (Jordan et al., 1991; Miller, 1976). These researchers argue that authentic, growth-enhancing relationships provide a context for individuals to create critical human connections and, as a result, to personally grow and develop. Many individual psychological problems, in contrast are rooted in disconnected relationships with others (Surrey, 1987).

The Stone Center researchers identified three characteristics that distinguish such growth-enhancing, "relationally-based" relationships from other forms of relationships: (1) mutuality, (2) interdependence, and (3) reciprocity. *Mutuality* is the respectful commitment of both individuals in a relationship to work on their self-development (Jordan et al., 1991; Josselson, 1992). This dynamic means that individuals must be ready to provide authentic support and encouragement to the other. Additionally, it means that individuals must be willing to try to act in a manner congruent with their thoughts and feelings, and remain open to exploring the barriers that prevent them from doing so. *Interdependence* refers to the belief that creating relationships with others, as opposed to remaining

autonomous, is a better approach to learning and growing. *Reciprocity* refers to the expectation that individuals in a relationship will contribute to each other's learning, in essence both having the skills to create these relationships and the motivation to use them. An important aspect of reciprocity is relational competence, "the interest and capacity to 'stay emotionally present with,' to enlarge or deepen the relational context to create enough 'space' for both individuals to express themselves and to allow for possible conflict, tension and creative resolution" (Surrey, 1987, p. 5). Thus, individuals wishing to create growth-enhancing relationships must try to remain adaptable to the changing needs of both themselves and the other person.

These researchers also identified three important relational skills that enable individuals to create conditions of mutuality, interdependence and reciprocity. These skills include the ability and willingness to (1) communicate empathy, (2) feel and express vulnerability and emotions, and (3) help others to develop (Jacques & Fletcher, 1997). The first of these skills, communicating empathy, is a process of trying to understand and respond to another's perspective, taking into account one's own thoughts and reactions in the process. For empathy to be effective, an individual must not only consider themselves and the other individual in the interaction, but they also must address both the affective and cognitive aspects of what they, as well as the other individual, are experiencing (Jordan et al., 1991). Thus, an individual communicating empathy will try to surface and express both what he or she is thinking and feeling in the context of acknowledging the thoughts and feelings the other individual is expressing.

Feeling and expressing vulnerability and emotions are also critical to creating growth-enhancing relationships. This means that individuals in relational relationships recognize their interdependencies with one another and are willing to expand their personal boundaries and share deep felt thoughts or concerns. Those wishing to grow and learn from these relationships must be open to considering their own affective reactions (and the reasons underlying them) to the experience.

Helping others to develop is the third skill important to creating growth-enhancing relationships. This capability does not suggest that individuals need to “have the answers” to others’ dilemmas. Rather, it means that in an effort to help others, individuals will try to remain conscious of and willing to share their own perspectives, being attentive to the moment. At the same time, they will try to be aware of and responsive to the other’s changing needs, as well as the tensions that differing needs can escalate. All of these skills contribute to what Fletcher (1996, p. 115) calls *fluid expertise* or “skills in enabling others (ability to assume the expert role in guiding, teaching, explaining) and skills in being enabled (ability to step away from the expert role in order to be influenced by and learn from others).” The resulting growth-enhancing relationships are characterized as providing individuals with “five good things”: zest, empowered action, increased self-esteem, new knowledge and a desire for more connection (Miller & Stiver, 1997).

### ***Relational Practice in Organizational Settings***

Although most of the Stone Center Research is conducted from a clinical perspective, a growing number of researchers (including those at the Stone Center) are beginning to apply these concepts to organizational work. In her study of women engineers, Fletcher (1998, 1999), for example, identified important relational skills that women were using in their work place. These skills not only included behaviors that contributed to the ultimate success of a project but behaviors intended to empower others working on that project as well. Additionally these women worked on their own self-development and improvement, seeking to build and reinforce a sense of unity and team with others.

Despite such positive outcomes, Fletcher (1998, 1999) showed how these behaviors were devalued and marginalized in this particular organization. Members attributed these women’s behaviors to their desire to assume care taking and nurturing—“mothering” roles. In doing so, they devalued their use, an action that not so subtly reinforced aggressive, individually-focused behaviors, and rewarded those who

displayed them. In other words, while the organization relied on the relational behaviors and skills of these women, it did not publicly or structurally acknowledge them as valuable and, in fact, minimized them by assuming they were due solely to gender differences between men and women, one important assumed difference being women's desire to perform care-taking roles. As Jacques and Fletcher (1997, p. 14) noted, "the benefits of doing the concrete task with these relational dimensions intact—and the costs of doing them without these dimensions—are not typically included in measures of effectiveness." From a poststructuralist perspective, this marginalizing of relational work served to support the dichotomized separation of public and private work, and, in doing so, reified the patriarchal status quo (Fletcher, 1998, 1999).

### ***Relational Skills and Service Delivery***

This research considers and demonstrates one sphere of organizational work where the use of relational skills is included in measures of organizational effectiveness and formally recognized and rewarded—the delivery of professional services. In fact, relational skills may have important links with ways professionals interact with clients and deliver their expertise. This study is aimed at uncovering what a relational approach to client service might look like and how it potentially can contribute to a professional's success.

### ***The Research Study***

This study, which took place during 1999, was part of a larger examination of professional work identity and service delivery. The research site is three of the big five public accounting firms and the sample focused on fifty partners, directors and managers directly responsible for generating and managing a client base and its associated revenues. Thirty-five of the fifty respondents were generally

involved in the consulting end of the practice and the remaining ten were involved in audit and tax work.

### ***Data Collection***

To assess how service professionals approach delivering their expertise to clients, in-depth, structured interviews were conducted with all fifty respondents. These interviews were based on the protocol in Table 1. The goal of the interviews was to uncover service professionals' thoughts about (1) their clients, (2) the type of service they believe their clients expect from them, and (3) ways they go about delivering their expertise. The intent was to uncover the different approaches service professionals both implicitly and explicitly use to service clients. Interviews, on average, lasted between 60 and 90 minutes. With respondents' permission, thirty-five of the interviews were tape recorded and immediately transcribed. To the degree possible, copious note taking was used with the remaining five interviews.

[TABLE 1] the research study

### ***Data Analysis***

Using the transcripts and notes, the interviews were coded and content analyzed, drawing out key themes that emerged from the data. While evidence of relational practice was not explicitly sought, key trends did emerge from the data. Specific concepts and ideas embedded in the respondents' answers were coded. After all interviews were analyzed, the codes were compared, creating categories of concepts. The data were then reanalyzed, ensuring that all codes were fairly represented by key

categories. When all categories were identified, the themes were reassessed and reviewed with ten of the respondents, checking for accuracy of understanding and credibility of the findings.

## ***Results***

Of the fifty consultants interviewed for this study, six (four women and two men) had created a specific consulting approach, one very different from the one used by the others in the sample. This specific consulting approach reflected relationality concepts. Before describing this approach and the differences between these two groups of consultants, it is useful to examine two key commonalities across the respondents.

### ***Value of Experience***

Ninety percent of the respondents commented that without experience, consultants do not have much to offer clients. Experience relates mostly to exposure to their clients' industries and, preferably, an underlying familiarity with the challenges and pressures of their clients' jobs, which serves as the source of their expertise. As one respondent commented: "I could never conceive of being a consultant right out of college. I feel pretty comfortable having been in the business 25 years before I decided to try to be a consultant." Another said, "if you don't know what you are doing and you don't have industry knowledge, you don't even get to play. I mean to me, that's a prerequisite ... That's what allows you to run the race." When asked about important qualities and skills, one consultant focused on "the ability to convey years of experience into a quantifiable consulting product." According to respondents, experience provides the necessary training and expertise that enable consultants to offer help.

### ***Individual Reputation***

A second commonality for 64% of the respondents is the belief that their clients hired them for their individual, as opposed to their firm's, reputation and expertise. Many discussed the reputation they created for themselves, a reputation they believed would follow them if they ever joined another firm. As one respondent said, "a lot of these engagements are folks who I knew, and that as soon as I was available to be a consultant they asked me to work for them. They wouldn't have cared if I was independent or part of (another firm)." Another said, "my clients told me, 'we don't care whose name is on the letterhead, as long we get you.' That's what the investment in the relationships has gotten me. The loyalty in me." Still another commented that, "one of the things that has plagued us through the years is (related to) the rainmakers, the practice leaders, the partners and the directors; our level of activity is directly related to the amount of personal marketing and practice development that they do." The conundrum for big five consulting firms is that they count on their partners to bring in business, yet clients are often more loyal to the partners than to the practice.

Despite these commonalities, the consultants in the sample differed in their views on service delivery. These differences fell along a relational approach versus more traditional expert-based approach, and are distinguished by four specific characteristics (summarized in Table 2).

[TABLE 2] the research study

### ***Empowering Versus Advising the Client***

The first characteristic of a relational approach to professional service delivery is an intent to empower the client with knowledge and skills that contribute to their personal success. Consultants who use this approach apply their experience and expertise to provide personal support to the client. They refer to themselves as the client's coach. As one respondent said, "what I do is let them know that I



understand what their position is in the company, what risks they are taking by embarking on some of these projects, and that I'm going to do everything in my power, single mindedly, to make sure that they come out as heroes in their own business group." Additionally, another consultant mentioned, "if I'm working on a chain of coffee houses, I will do research on coffee house trends, new food and beverage product lines, and new store design that is not part of the deliverables of my project written in any contract, but it continuously allows me to communicate and build a relationship and provide information to the client so that he or she knows that even though it's not of a specific scope of the work, I'm thinking of them and I want them to get smart." Along a similar line, a third respondent noted, "My strategy is different from any other partner here. I figure out the one thing my client needs to do his job well and I give him the tools or information to do it. I'm the behind the scenes person. And my client is the one who looks good."

The more traditional approach, in contrast, is to advise the client. Consultants who adopt the role of advisor believe their job is to use their experience and expertise to provide clients with the answers to their problems. This perspective is the generally held view of most of the consultants interviewed. In fact, 58% of those interviewed referred to themselves as the client's advisor. As an example, one respondent mentioned, "clients expect someone who can articulate 30 years of experience in the business and translate it into telling them something they don't know about the business." Another noted, "all of our clients are looking for experts ... somebody to stand up and tell the audience what the right answer is... they need someone else with the credibility to come in and sell it to their boss... they're all looking to you for your expertise." Still a third respondent commented, "we're advisors ... clients come in and say how do we get from here to there?" Most respondents spoke about solving clients' problems as the nature of their work. They believed that if they solve the problem well, clients will continue to use them for additional projects.

## ***Learning from Clients Versus Taking Knowledge from a Project***

A second distinguishing feature of a relational approach is the belief that clients can teach consultants new things. As one respondent commented, “I always learn so much from my clients, usually about their very specific primary drivers.” Another discussed different things his clients teach him. He mentioned, “one of the clients I’ve worked with is the new president of a private company that’s preparing for an IPO. We’ve talked a lot about the issues in his board of directors and how he got his financing. I don’t advise him on any of that, he sort of is just telling me all about those things, so I’ve learned a lot about it.” A third respondent described the collaborative nature of consulting, observing “I look upon it as they (the clients) know something we don’t and we know something they don’t, but we know a bit about what each other does so you combine it together ... You both end up learning and you both end up getting things done.” Consultants who hold this view are comfortable letting their clients teach them things. Clients are viewed as sources of new knowledge.

Alternatively, 52% of the consultants in the study did not believe their clients taught them new things. Rather, they phrased it as taking away information from a project. The implicit tone was that, as experts, consultants should not look at their clients as potential teachers. In the course of their work, however, they did observe things or learn new things about the client’s industry. One respondent mentioned, “sure, I learn from clients all the time. And at the industry level you learn something about their work. But do they teach me things? No. You have to have the right mindset and have an inquisitive mind. If you don’t go looking for it, you don’t see it.” A second respondent commented, “I’m one of those who always takes, takes away from the experience, and what I think I learn most from my clients is how many, how often at a senior level, they know extremely little or nothing at all about their industry.” While these consultants clearly learned things on their engagements, specifically about their

clients' industries and business challenges, they do not view their clients as sources of learning. They view the "real" learning as a one-way process, from consultant to client.

***We versus Me: View of self as dependent on versus independent from the client.***

The consultants who used a relational approach viewed themselves as dependent—in a mutual way—on their clients. This concept is akin to a relationship marketing approach (Berry, 1995; Bitner, 1995), where the consultant seeks to create enhanced value for clients over time through learning about the client and customizing the product to meet the clients' changing needs. One respondent who held this view mentioned how, "to me the relationship is more important than the project. Projects will come and go, but the relationships should stay in place. I nurture my relationships ... And in fact my clients, my handful of very very dear and long-term clients, before I moved to [firm], I went to all of them and asked them how they felt about it. If even one of them said 'no way, we won't follow you over there,' I wouldn't have gone ... the relationship is more important to me than anything." A second respondent mentioned that, "if you build the relationships, the services follow. My job is to keep giving my clients new ideas, new information. Twenty-five percent of the time, something hits. I have to be flexible and creative for them. They are my success." These consultants view themselves as dependent on their clients, and they work very hard to ensure their clients are satisfied with the relationship.

Reflecting a more traditional view, 82% of the consultants in this study see themselves as independent, or partially independent, from their clients. They work with their client, and hope that their projects lead into additional work, but for the most part, these consultants see themselves as the independent eye that moves from project to project, and from client to client. As an example, one respondent, claimed, "in a lot of cases, we'll end up with clients who aren't happy because they don't like the answer. We are a big five accounting firm and we can't forget what the 'P' in CPA stands for—

the public—and the public expects that if our name is on the report, I think there’s an assumption that it’s been looked at with the public in mind, so ... our credibility is critical there ... You don’t want to have too close a relationship with your clients ... you need to remain as professional as possible.” Similarly, another respondent said, “one of the more important qualities and skills a consultant should have is judgment, being able to make an informed, objective opinion ... that’s what I give clients. I’ve built my reputation around that.” A third mentioned, “clients hire us for the independent view. It’s this concept of having an independent third party who’s an expert in a particular industry and we’re viewed as part of due diligence activities ... The client wants to have that independent analysis come from a group like us.” These consultants view their independent, objective opinion as critical to their work and their credibility. They do not think of themselves as dependent on their clients. Rather they see their clients as dependent on them for the credibility their expertise and firm name provides.

### ***Demonstrating Expertise Through Asking Questions versus Telling Information***

The last distinguishing characteristic of a relationship approach is the way expertise is demonstrated. Consultants who use this approach tend to ask focused, careful questions, using listening skills as a strategy to discern clients’ needs and, in doing so, to demonstrate their knowledge. For example, one respondent mentioned how, “my way of letting people know I’m an expert is by asking questions that are thought provoking, that make them know that I’m bringing something to the table because they wouldn’t have even known to ask those questions.” A second respondent said, “the good partner will take the time to figure out the client’s needs, will ask lots of questions and spend lots of time listening to what’s important to the client.” Additionally, one respondent commented, “it’s collaborative, it’s me asking questions and then shutting up and hearing what the client has to say. That’s how I help them.”

Alternatively, those who use a more traditional approach demonstrate their expertise through telling and showing clients how much they know. Sixty percent of the respondents use this approach and demonstrate their expertise through not only what they say, but through how they say it. On consultant, for example, discussed how, “it’s important to have good presentation skills ... how it’s presented and how it’s delivered is very important to clients ... it’s confidence and you have to come back at them a little bit with the, not with the ego, but that you’re confident ... approach is really important.” Another said, “all of our clients are looking for experts, but if you can’t get your point across both verbally and in writing with confidence then it’s going to be useless to the clients. It’s so important. You must be able to stand up in front of a crowd and sell the project, sell our clients, sell them that we’re qualified to do the project.” A third respondent said, “I explain and teach. But I have to stop if they get Bambi eyes. Then it’s all over.” In this more traditional view, consultants show their expertise through telling and teaching.

## ***Relational Service Delivery***

A limitation of this study is that the data were not as clear as the preceding discussion may suggest. Some respondents gave multiple answers to questions; others offered some responses that indicated a relational approach and other responses that indicated a more traditional one. In addition, some offered responses that did not fall into either category. The distinguishing feature of these results, however, is that six of the fifty respondents offered answers that closely mirrored relational practice, while the majority of respondents offered answers that followed a more traditional approach to consulting and service delivery.

Reflecting on Fletcher’s (1998, 1999) research, relational practice at work includes behaviors that contribute to the overall success of a project, empower others working on that project, enhance self-

development, and build and reinforce a sense of unity and team. Fletcher's conclusions strongly parallel findings in this research. Those respondents who incorporated a relational approach in their service delivery attempted to create working relationships that fostered questioning, listening and idea sharing. These consultants worked hard to empower their clients, not with information and data per se, but with new knowledge and tools. By doing so, they not only helped them on the assigned project, but also provided a foundation that their clients could use to build success in other aspects of their work as well as other relationships. Moreover, these consultants did not perceive themselves solely as the client's coach or support system, instead viewing their clients as a source of new learning for themselves as well. In fact, these consultants viewed themselves as dependent on their clients and their client relationships. This dependency was seen as a source of their personal success and reputation rather than a weakness. This mutual, shared approach to learning and developing mirrors the concepts that describe growth-enhancing relationships.

The more traditional approach used by the majority of consultants in this study, in contrast, reflected more expert-based, one-way service delivery. These consultants viewed themselves as primarily the client's advisor. Their role was to inform and pass knowledge to the client, and they did so through telling the client new information. These consultants viewed their experience working on projects, not working with clients, as sources of new knowledge. Many also adopted an independent, objective manner that they believed helped contribute to the credibility of their firm, credibility being the primary driver for new business. These concepts support those in the professional literature that suggest experts impart knowledge to clients in a one-way, control-oriented manner, from consultant to client. In fact, one only needs to think of interactions with their doctor or lawyer to see that this approach represents a common way of delivering expertise in certain professions.

These findings suggest one way relational practice is used in professional service delivery by both men and women. This approach reflects the importance of creating and maintaining relationships where both parties grow and develop, illustrating how a “relationship marketing” concept can be applied to consulting, where over time the consultant continuously tailors the product to meet the client’s needs and, by doing so, sells the relationship as much as the product.

While strong communication skills have long been viewed as critical to building client relationships, this study suggests that the way in which such communication skills are used is also important. As indicated in the inter-views, the capability to create a *power-with* versus a *power-over* mindset—via communication and listening skills—was perceived to enhance the ability of some of the consultant respondents to meet their client’s unique needs.

This approach is different from process consultation models of consulting (e.g., Schein, 1988) that focus entirely on co-collaborative process skills. A relational approach blends expertise *and* process. Through the ways they interact with their clients, consultants who use a relational approach deliver their expertise in such a way that enables both parties to grow and develop. The respondents in the study felt that both themselves and their clients were better for the experience.

Does using a relational approach lead to greater success for service professionals, especially consultants? Of the six respondents who identified a using relational approach, three commented that they were the top revenue producers for their group. Of the majority of consultants who reported using the more traditional approach, seven commented that they were one of the top producers in their group. Thus, rather than speculate, the next step in this research is to examine specific consulting approaches in the context of (1) client satisfaction and (2) their relationship to long- term financial success.

These findings offer a different avenue for research on consulting practice. Concepts in the gender and especially relational-practice literature provide a useful framework that can be used to examine and explain novel ways in which professionals and clients can work together. At a minimum, they suggest that the traditional approach to delivering expertise may no longer act as the rule and that today's clients could strongly benefit from a mutually developmental approach to expert-based consulting.

Relational practice, as discussed in gender research, offers an interesting and potentially important framework that can help us better understand the different ways service professionals interact with clients to deliver an expertise. Findings in this study show that consultants who use a relational approach apply a collaborative mind-set and skill-set to create empowering, growth-enhancing relationships with clients, where the client and consultant learn from one another. Paradoxically, the dependency the consultant has on the client is a source of strength and success. These findings offer a different way to think about service delivery, an approach that may become increasingly commonplace in the twenty-first century.



**Table 1.** Interview Protocol

1. Describe your typical clients.
2. Beyond solving their immediate problem, is there anything else your clients expect from you?
3. What do you expect from your clients? What if any, is their job?
4. If you were training someone to take over your job, what would you tell them about your clients?
5. What if anything, do your clients teach you?
6. Please finish the following statement listing as many descriptors as necessary: "As a consultant, I am..."
7. What words would you use to describe what you do?
8. What is the purpose of your work?
9. What are the most important qualities and skills an accountant should possess?
10. Why do you think your clients seek you out—as opposed to another professional?
11. What do you think nonmembers—such as clients—think of your profession?
12. What do you enjoy most about membership in this profession? What do you enjoy least?
13. What do you think nonmembers—such as clients and other colleagues—think of your firm?
14. What do you enjoy most about membership with this firm? What do you enjoy least?
15. What else is important to know about your clients and client service?

**Table 2.** Relational Approach versus a Traditional Approach

<b>Relational Approach</b>	<b>Traditional Approach</b>
Empower the Client	Advise the Client
Learn from the Client	Take away Knowledge from the Project
We: Dependent on Client	Me: Independent from Client
Ask Questions and Listen	Tell Information

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