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and University of Cologne**

How do strategy consultants successfully deploy tools?

A qualitative study on the successful strategy
consultant's toolkit

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Abstract

The purpose of this master thesis is to understand the underlying mechanisms of a successful strategy consultant's tool deployment. Additionally, a conceptual framework shall be developed that can give guidance on what variables to consider when choosing an appropriate tool deployment strategy in the consulting process. The research objective is achieved using qualitative semi-structured interviews and the data is analyzed using template analysis. Five distinct themes describing the factors influencing strategy consultant's tool deployment are found: activity-related, client characteristic-related, industry-related, consultant background-related and remote work-related factors. Further, implications for a possible tool deployment strategy are drawn synthesizing theory with the findings. The thesis adds to the theory on strategy consulting tools as the gap could be bridged between the conflicting character of strategy tools and how strategy consultants actually enable tools as a success factor. The practical contribution is found in the self-assessment questionnaire for consultants derived from the findings. Limitations can be found in the small sample size, limit to Germany as a geographical region and focused look on strategy consulting. Future research should verify the results of the study with a larger sample size, extent the scope to a broader geographical region and compare to other consulting fields.

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1 Introduction

Strategy consulting is one of top three management consulting fields in Europe, taking up 19,7% of profits in the consulting sector in 2020 (Graefe, 2022a). In Germany, for example, strategy consulting is the second-largest consulting field, capturing 24,7 % of the management consulting market in 2019 (Graefe, 2022b). In distinction from other consultancy sectors, strategy consulting is often defined by loosely structured problem statements, taking a global view, in comparison to the detailed view of functional consulting for departments (Nissen, 2007). The typical client challenges comprise inter alia organic business growth by market share increase or product development, expansion to new markets, cost-reduction activities or restructuring of organizational inefficiencies (Wickham & Wilcock, 2020). The strategy consultant was once regarded as an omniscient expert who imposes organizational changes to an inefficient customer. Today, she is challenged by switched power dynamics and increased complexities of projects (Nissen, 2007). The projects are characterized by involvement of several stakeholders, with multi-way communication and a professionalized commissioning with handbooks and guidelines for how employees cooperate with consultants. In consequence, consultants have to optimize their communication and prepare upcoming projects in-depth to meet client's expectations. If strategy consultants want to prevail against competition, they need to deliver the value they are hired for. This value can be created on three different levels of competencies – functional, interpersonal and methodological. In recent years, research on success factors in consulting has focused on interpersonal skills, such as the consultant-client relationship (Appelbaum & Steed, 2005; Cerruti et al., 2019; Kakabadse et al., 2006; Lallier Beaudoin et al., 2022; Pozzebon & Pinsonneault, 2012) as well as subject-related skills, such as consultant expertise (Banai & Tulimieri, 2013; Bronnenmayer et al., 2016; Cerruti et al., 2019; Simon & Kumar, 2001; Solomonson, 2012). At the same time, the literature on methodological skills of consultants to work successfully with suitable tools in their client projects is scarce.

The methodological competences of consultants are defined by Andler as the systematic skills to logically dismantle client situations with the help of tools and techniques (Andler, 2011). A sub-set of these competences is the consultant's toolkit. A tool shall be defined as a ***method or concept with a standardized scheme which is modifiable to individual cases. The information input type is pre-defined. It should support in structuring thought patterns, visualizing or***

simplifying and thus guide the user's actions to perform a certain activity (Andler, 2011; Lippold, 2018; Zerfaß & Volk, 2019). As a result of the increased competitive pressure in the industry, tools, models and frameworks are developed to deliver and conceptualize ideas. In practical guides, one can find endless numbers of helpful tools. As an example, typing in “management consulting tools” in Google leads to 581.000.000 results. In the “pool of tools” out there, it is accordingly difficult to find the most effective tools for the specific needs of the customer. Further, practice and theory are discordant about the relevance of tools for consulting success. On the one hand, the contribution of tools to consulting success was questioned over time by researchers as the standardization by tools opposes the individual nature of client problems and complexity of issues cannot be covered due to oversimplification (Bamberger & Wrona, 2012). Especially young professionals, who gained theoretical knowledge about tools in universities, struggle with the pitfall to blindly apply textbook tools without reflecting on the limitations. On the other hand, tools play a central role in signalling the ability to meet the promised performance to the clients, because they can contribute to reflective thinking and professionalised decision-making (Bamberger & Wrona, 2012). Further, in practice several tools have been able to settle in the market and stay valid even over decades, such as Porter's Five Forces, the BCG Matrix or the SWOT analysis (Burtonshaw-Gunn, 2010). The continuous relevance demonstrates the legitimacy of tools.

The question arises, how successful strategy consultants overcome the described tension and exploit tools as an accelerator of success in consulting projects. Not only must they choose the suitable tool for individual client needs, but also the right timing, application and documentation. The consultant, maybe unconsciously, has to outweigh several variables and ultimately choose a tool deployment strategy. Consequently, the research question shall sound as follows: *“How do strategy consultants successfully deploy strategy tools in their client projects?”* The purpose of this master thesis is thus to understand the underlying mechanisms of a successful strategy consultant's tool deployment. Additionally, a conceptual framework shall be developed that can give guidance on what variables to consider when choosing an appropriate tool deployment strategy in the consulting process. As there is no existing theory to be tested for the phenomenon of the successful consultant's toolkit, the thesis will be using an inductive approach. Therefore, a qualitative interview study shall be conducted.

This paper is structured as follows: In Chapter 2, the related theory of the management consulting success factors and strategic management tools is outlined. This is followed by a

description of the methodology, including research philosophy, participant selection, data collection and methods for data analysis in chapter 3. Subsequently, chapter 4 presents the interview findings. In chapter 5, the findings are discussed and in chapter 6 the conceptual framework is developed in order to answer the research question. Followingly, the practical and theoretical contribution as well as the limitations and implications for future research are outlined in chapter 7 and 8 . The final chapter 9 is the conclusion.

2 Theoretical Background

To further explain the significance of the research question, the current state of literature on management consulting success factors as well as strategic management tools shall be elaborated. In general, it has to be noted that literature focuses on western countries and private organizations, while there is a need for a more intensive study of consulting in emerging markets and public organizations as well as SMEs.

2.1 Definition Consulting Success

Literature on management consulting gives several definitions of “consulting success”. Bronnenmayer et al. (2016) studied the relationship between success factors and success dimensions. They define success as adherence to agreed financial goals and timing, meeting of agreed project results and acceptance of the proposed actions by the client organization (Bronnenmayer et al., 2016).

Schaffer (2002) develop a theoretical model including three payoffs that need to be given to claim a successful consulting project. The solution or method created by the consultant must be innovative to the organization. The augmentation of organizational performance must be quantifiable. And lastly, this augmentation must be sustainable even after the consultant has left the client organization (Schaffer, 2002).

Simon Kumar survey 149 Australian managing employees and find three main indicators consulting success: achieving prior set objectives, client satisfaction, on-time completion. They conclude that financial and non-financial indicators are necessary to capture project success (Simon & Kumar, 2001). Synthetizing the definitions of success in literature, one can see that a high emphasis is put on the client’s satisfaction and sustainably enhanced processes as an indicator of success. Further, also quantifiable indicators such as time and budget are commonly used.

2.2 Success Factors in Consulting

Interpersonal

The interpersonal success factors cover several forms of consultants' social skills and emotional intelligence. These competencies are often described by scholars as the "Client-Consultant relationship" (hereafter abbreviated as C-C relationship). Literature highlights the relevance of empathy and univocal communication and gives several empirical evidence. Appelbaum and Steed (2005) conduct a survey case study in a major telecommunication company from North America, with 102 employees from top and middle management. The significant variables that have a positive influence on the C-C relationship and thus the project success in their survey study are, first of all, the respect for the client's capacities to incorporate the proposals from the consultant. Secondly, the expectations are clearly communicated on both sides. And lastly, a feeling of partnership is created (Appelbaum & Steed, 2005). A similar stream of argumentation can be found in the work of Lallier Beaudoin et al. Through a questionnaire of 193 French-Canadian managers, a direct positive effect of a strong c-c relationship and consulting success is shown. The tested variables are professional agreement (=clear communication of expectations), constructive exchanges and interpersonal compatibility (Lallier Beaudoin et al., 2022).

Kakabadse et al. furthermore interview 17 business consultants from various fields such as change management, IT, Finance and HR. Once again, the results support the relevance of the C-C relationship, as trust and equal treatment of employees and consultants were identified as a prerequisite for project success. Additionally, freedom of expression and openness in communication is stressed. The interviews also reveal humility in consultants' self-perceptions since own failures and boundaries of skills are admitted (Kakabadse et al., 2006).

Another stream of research related to the interpersonal success factors are the power dynamics between consultant and client. Pozzebon and Pinsonneault find in their interview study a lack of fixed dependencies and interrelations, describing the C-C relation as a movement with shifting of power dynamics (Pozzebon & Pinsonneault, 2012). This shift is also discovered by Campagnolo (2013). He claims that consultancy is underlying the dynamics of the expertise developed in a specific field. In his case study of IT consulting, the more knowledge is possessed over time by the client firm, the more power goes over to the client (Campagnolo, 2013). This client self-empowerment leads to an increased pressure to perform on consultant side. A contradictory empirical result is given by Kakabadse et al. (2006). The control

consultants inhabit is emphasized by interviewees and there are different reasons for the high level of control. Sometimes, the control is willingly handed over to the consultant, while in other cases it is inevitable due to a lack of clarity in an uncertain situation or a lack of expertise (Kakabadse et al., 2006).

Functional

The functional competencies cover skills acquired through educational and professional experience, related to the consulting fields, such as HR, Marketing, IT or Strategy, as well as specific industries (Andler, 2011). Bronnenmayer find a significant positive effect for six of seven success drivers tested, with consultant expertise with one of the strongest evidence (Bronnenmayer et al., 2016). They note that the success factors should be considered as intertwined and should thus be integrated comprehensively. Banai and Tulimeri (2013) summarize academic findings on the consultant characteristics required by clients for effective consulting processes. They state that industry knowledge and knowledge of organizational functions is of higher credibility when accumulated through work experience which diminishes the relevance of academical training (Banai & Tulimieri, 2013). A qualitative study of 80 international clients of a multi-billion-dollar revenue consulting firm from 2005 compares the customer satisfaction drivers of US and international firms. Knowledge and expertise as well as experience in the industry has the highest mentioning from both US and outside US firms. Interviewees highlight the importance of not having to invest into training the consultants as well as having the assurance the consultants are aware of business processes. (Haverila et al., 2011).

Methodological

As defined in the introduction, the methodological factors are first and foremost technical skills needed to solve client issues, which also include the toolkit that shall be analyzed in this thesis. Besides interpersonal communication skills, Banai and Tulimieri identify a need for increased active listening skills for successful consulting projects. Academic and professional settings focus on the development of speaking skills. They also emphasize the necessity of analytical skills, in order to gain encompassing understanding of the issues at the client's organization. Creativity skills are in need to think outside the box and come up with innovative solutions instead of sticking to identical clusters of thoughts. Lastly, strategic and tactical conceptual abilities lead to success by being able to look at macro and micro picture of the client situation simultaneously (Banai & Tulimieri, 2013).

Jang and Lee (1998) elaborate on the determinants of consulting success and mention relevant methodological competences. They define data collection and evaluation as well as methods to optimize client training as key competencies. Further, according to their work, it is highly relevant that the methodologies of the client match with the consultant, as many consultants are equipped with the newest management fashion. Clients have to be enabled to work with the same tools in order to sustain long-term project results (Jang & Lee, 1998).

Another methodological success factor is the deployment of project phase models. According to Wickham and Wilcock, the success of a project depends decisively on the right sequence of action steps (Wickham & Wilcock, 2020). Therefore, theory and practice have developed models that consultants can follow from acquisition to closure of a project. The phase models differ in number of phases, however they all aim at displaying the ideal consulting process (Andler, 2011; Block, 2000; Lippold, 2018; Wickham & Wilcock, 2020). One example is the DMADV process of the Six Sigma methodology. It was developed for introducing new processes or products. In this case, the consulting project is divided into five phases: Define, Measure, Analyse, Design and Verify (Wickham & Wilcock, 2020). Visscher studies the need for consultant training on different methodological skills. He discovers that 64% of study respondents work with phase models on a regular basis. He argues for a two-folded value of these models: On the one hand, the models have internal value as they provide safety in action choices and help to train junior consultants. On the other hand, they have external value as they facilitate exchange with the client and enable project controlling (Visscher, 2006).

Lastly, one can find a study by Bamberger and Wrona (2012) on tools as a success factor in consulting. The authors elaborate on the role of tool skills for success in strategy consulting. They conclude three main purposes from their study of literature. First, the work with tools can reduce the complexity of the client's environment and make it tangible. Second, the work enables a discourse by presentation of new phenomena. And lastly, it ensures adaptability to the individual client's situation (Bamberger & Wrona, 2012). The authors acknowledge also four types of criticism towards tools in strategy consulting. Firstly, the usage of standardized tools contradicts the individual nature of firm strategies. Secondly, strategy tools are essentially a form of marketing aiming at acquiring clients through re-inventing common problems. Thirdly, the benefits of tools are not sufficiently scientifically proven. Fourthly, the high degree of simplification misleads the users to underestimate complexity. Keeping in mind both purpose and criticism, the authors set the premises under which, from their point of view, tools are an

enabler for consulting success. Strategy development must be regarded as a process with increasing uncertainty and decreasing concreteness of action steps, the wider the time horizon. This implies that fully grasping the future of a company is an unrealistic expectation towards tools. Additionally, strategy is always an individual path due to individual resources, competences and weaknesses of firms. As a consequence, no tool user should regard tools as universally applicable and tool outcomes can vary tremendously. Lastly, tools represent means, but not a guarantee for success in the consulting project. In conclusion, the authors argue for a human-centric view. Whether tools can be fully used as an advantage consequently depends on the consultant's methodological skills to understand the qualities and borders of tools (Bamberger & Wrona, 2012).

2.3 Strategic Management Tools

The literature on strategic management tools has been elaborating on the gap between the theoretical tool usage taught in business schools and the actual application in corporations. Jarzabkowski and Kaplan (2015) study three elements of tools in use: selection, application and outcome. They develop a framework analyzing the influence of tool characteristics and user intentions on the interaction between tool selection, application and outcome. They identify multiple arrows of possible influence, for example, the tool selection may be influenced by the anticipated application, however also the application is shaped by the tool selected in the first place. Their conclusion is that tool conversation should not be about good or bad usage, but rather talk about the various interactions in the process of strategy making (Jarzabkowski & Kaplan, 2015). Gunn and Williams (2007) aim at finding groupings of tool users for particular tools, in order to identify their underlying motivations. In their survey of 149 CEOs, they identify four distinct tool user groups: academically trained managers, professionally trained managers, stakeholder aware managers and competitor aware managers. The findings show, inter alia, that academically trained managers are more prone to use tools with a highly theoretical basis, as for example scenario planning, which is widely spread in industry think tanks with academic members. Professionally trained managers tend to use tools developed in a practical context, for instance by consultancies (Gunn & Williams, 2007).

Zerfaß (2019) summarize the state of literature on the purpose and deficiencies of strategy tools. Arguing for the use tools, they identify inter alia increased efficiency in solution-finding as tools structure sequential tasks. Further, the simplification of complex issues and visualization of relevant information is highlighted. Another argument is the creation of a common language

in the daily business, reducing misconceptions and the need for explanation. Lastly, they identify the signaling character of strategy tools, demonstrating rationality and thus inducing acceptance by the stakeholders involved (Zerfaß & Volk, 2019). On the other hand, several limitations of tools are found in literature. One particular issue is the difficulty to differentiate unsubstantiated industry hypes from profound solution-enhancers, which leads to frustration and reluctance in the workforce. Similarly, relying on tools can risk a feeling of safety and completeness and thus lead to wrong management decisions. The providence of structure and action steps can also lead to a restriction of creativity and consideration of additional factors. Summarizing, the authors state that the manager should start from the problem and look for a suitable tool and not the opposite way. The value of strategy tools is dependent on the ability of the user to reflect on the right application (Zerfaß & Volk, 2019).

The thesis is merging the two disciplines success factors in consulting and strategy management tools. The identified studies support once again the reasoning for the research question of the present master thesis. Research identifies three types of success factors in consulting. As one of the methodological factors, the successful tool usage hinges on the individual consultant's abilities. Also, the literature on strategy tools identifies the dependence of tool value on the user. However, a gap can be found in how the abilities to apply a tool correctly are developed in the first place. It shall be the goal of this thesis to understand the underlying mechanisms of a successful consultant's tool deployment strategy.

3 Methodology

3.1 Research Philosophy

Qualitative research is to a large part subject to the researcher's background and knowledge, as the evaluation of words and images cannot be as objective as numeric data. As such, the research philosophy gives direction for the analysis technique chosen and thus the outcome of the research (Saunders et al., 2019). This master thesis was conducted under an interpretivist philosophy. This implies the view that there is no single valid truth of a consultant's toolkit that can be universally applied. In opposite, the reality is shaped by each consultant depending on her or his background and experiences. The goal was thus to collect and reflect on the different approaches collected through the research to develop a conceptual framework that shall enrich the understanding of tool deployment. It was reflected on this philosophy throughout the research process.

3.2 Participant Selection

Participants were selected based on purposeful sampling. This means that individual consultants were chosen intentionally to learn about the tool choosing mechanisms (Saunders et al., 2019). The researcher's judgement was used to select cases that best help to answer the research question and give valid and reliable results. To ensure validity and due to the resource and time restriction, a subsection of management consultancy was determined. As strategy management was chosen, the criterium for interviewee selection was an occupation in strategy consulting. Within this field, it was aimed for a diverse view to increase relevance of results to all strategy consultants. The participant characteristics can be seen in [Table 1 Sample Characteristics](#) in the Appendix. The level of experience varied from junior, with about two years experience, to senior, with 20 years experience. The consultants were occupied in companies with a high variety of size, from ten to 70 000 employees. Further, several different industry expertise was represented, inter alia Public Sector, Industrials, FMCG and Health Care. It was aimed for a balanced representation of genders, which was unfortunately missed, with eight male and four female participants. As cultural differences cannot be neglected and consulting practices may vary decisively between countries, another criterium was current or former occupation in Germany. This was a necessary step to ensure comparability.

The size of the sample was determined by theoretical saturation. This means that the data collection process is continued until no new properties occur that are relevant to answer the

research question (Saunders et al., 2019). Nevertheless, the number of interviews taken may also depend on other factors such as access, resources and time (Corbin & Strauss, 2015). In the case of this master thesis, the research period was relatively short with approximately three months for the conduct of interviews. The resources were restricted as a single researcher, and access to interviewees was given by cold calling in a small network, without external incentives to participants.

3.3 Data Collection

The data was selected using semi-structured interviews. This form of qualitative research is characterized by a set of key questions and topics predefined by the researcher used to enhance an open dialogue with the participant (Saunders et al., 2019). As the philosophical approach taken was interpretivist, there shall be room granted for different thematic directions and new emerging themes depending on the focus field, knowledge and opinion of the respective consultant interviewed.

This research approach was appropriate because there is no theoretical framework on tools in strategy consulting to be tested, however, complementary research in the consulting field provide substantial prior knowledge on alternative success factors and management tools. The literature research represented the guidance for themes and thought patterns to discuss during the interview and could thus help to develop a priori questions, which is a pre-requisite for semi-structured interviews (Kallio et al., 2016). The interpretivist approach was also reflected in the relevance of people's perceptions and opinions through the interview questions. Interview questions were further balanced between a solid foundation from previous research and openness to controversial and novel ideas to avoid confirmation bias. The Interview guideline can be seen in [Figure 2 Interview Guideline](#) in the Appendix. It contained the guiding questions which are used loose and flexible, allowing for dialogue. It was structured clear and concise in an open-end format. Once the participants were selected, the research information sheet shown in [Figure 3 Research Information Sheet](#) was sent out to them. This was a necessary step so that participants understood the research objective and understand definitions, especially of the term "tools", within the thesis context. To ensure the scope of tools was clear, two examples of common tools were given. Further, the sheet contained a short summary of key elements in the literature that guided the development of the research question. This should support the understanding of why the interview research is of value.

3.4 Methods for Data Analysis

The data was analysed using a sub-method of thematic analysis, the template analysis. The procedure is defined as an iterative approach to theory development, in which the qualitative data collected is structured on three levels: codes, themes and clusters. King et al. describe an eight step process that was followed during this study (King et al., 2018). In the first step, familiarization, the data gathered in form of semi-structured interviews was re-read and understood. Sequentially, text passages identified as relevant to the research question were marked and given a buzzword in the preliminary coding. In this study, solely in vivo codes were used and no a priori codes, which meant that codes were only built on the basis of the terms found in the interview data. As the interviews were taken successively, the next step, clustering, began after the data of the first five interviews had been prepared. First relationships between the preliminary codes were developed and duplicates were merged. The fourth step was the creation of an initial coding template, which was rational after the first five interviews as a clearer picture of codes, themes and clusters had emerged. This template dealt as a basis for analysing the remaining data. In the fifth step, the template was modified after every three following interviews, when it could not cover the significant aspects of the added data. New codes were added, the codes were merged or replaced and new consolidated. A final version of the template was defined after all data has been coded and integrated, which can be found in [Figure 4 Code System](#). Lastly, the template was used to prioritize and interpret the data and write up the key findings which can be seen in the following chapters.

4 Interview Findings

4.1 Definition Consulting Success

As the goal of the research was to find the mechanisms underlying the deployment of tools that leads to project success, it was important to identify the definition of consulting success for the consultants interviewed. This identification helped to interpret the given answers on toolkit formation, as it implied the focus of attention of the consultants. It was logical that the choice of actions and tools would be depending on the ultimate goal of the consulting project.

It was seen that the majority of answers match at least in one element of consulting success. Two main themes as success criteria could be identified: the completion of the project triangle Scope, Cost and Timing and the client overall satisfaction. Most of the consultants orientated the success at the "project triangle", as first mentioned by interviewee A: *"For me it's very important to have to the triangle. The project triangle with Performance, Costs and Timing"* (Interviewee A, paragraph 9). Performance, from the definition he was providing, can be equalized to scope, which was mentioned by many following participants.

"A consulting project is successful if it reaches the results it's supposed to reach. So, that's first of all the scope. So we covered everything we wanted to cover" (Interviewee B, paragraph 4)

It described the qualitative output, the defined objections of the project. Other interviewees explained it as follows: *"So basically, take all the deliverables that you agree with the proposal and then of course in the contract."* (Interviewee D, paragraph 5)

The second element, Timing, was agreed on by many as a critical parameter. *„And the other thing is to meet the time goal. These are the two points from the triangular."* (Interviewee E, paragraph 8). Lastly, cost or budget was mentioned. The order of prioritisation hereby was given by the client and was evaluated through direct clear communication. However, one interviewee also mentioned a personal perception that "costs" are the least important, relativizing by stating it is depending on the client's monetary situation.

"Starting with the content and time, and the least important for me is finance. But it could change if you have a client which doesn't have really a lot of money, then maybe those goals for me change because then it's the most important to save money, of course." (Interviewee E, paragraph 8)

Success went for most of the consultants beyond the three tangible elements of the project triangle. A more personal, emotional side was added and summarized under "Overall Client Satisfaction". One interviewee called it the "human" factor, the satisfaction of all project

participants and stakeholders (*Interviewee C, paragraph 3*). Five consultants regarded long-term improvement, in terms of implementation of the defined strategy plan, as the indicator of satisfaction (Interviewee D, paragraph 5; Interviewee H, paragraph 2; Interviewee J, paragraph 2). Interviewee K stated an aim for review processes (Interviewee K, Paragraph 2) and Interviewee G aimed even for long-term partnerships: “*we are very focused on developing long term relations for that client.*” (*Interviewee G, paragraph 3*).

4.2 Conflicting Character of Strategy Tools

The research question of this master thesis was “*How do strategy consultants successfully deploy strategy tools in their client projects?*” Inferring from the interpretivist research philosophy, the thesis took the stand that consultants may have various realities regarding the benefits and limitations of tools. Yet, the acknowledgement and awareness of the conflicting character of tools by the interviewees was a prerequisite for answering the research question. The research question was developed arising from the motivation to overcome the tension by consultants. As such, if consultants regard tool deployment as a challenge to reach project success, it becomes relevant to study the underlying mechanisms influencing the tool deployment choices. Consequently, the second step of the data analysis was to uncover the participant’s view on tools.

Benefits

13 different benefits could be identified in the interviews. Providing a **structure** to guide the client through a project activity was mentioned by 8 of the 12 interviewees and is thus the most agreed on benefit of strategy tools for this sample. Besides Structure, **efficiency** was given by 7 of 12 interviewees, for example by Interviewee B: “*to do stuff more efficiently, so especially if you have for example repetitive tasks or tasks that require a lot of calculation, that may be prone to errors, then the tool will help you to reduce errors and increase efficiency of what you're doing.*” (*Interviewee B, paragraph 25*). Another set of benefits was aiming at signaling to the client. Tools were used to **signal competence** and professionalism: “*project experience can be better with tools, just because to actually have a tool looks more professional. So, for the customer it's a more professional experience than scribbling stuff down on paper.*” (*Interviewee B, Paragraph 43*), and give the client the feeling of control. The consultants also identified the opportunities brought by the prominence of certain strategy tools. The **universal acceptance** implied less explanation time: “*tools that are somehow globally accepted and you don't have to convince someone: why are you now using this kind of tool? So, it's something*

that everyone of us, especially in the business environment, has in the university.” (Interviewee D, Paragraph 7). The interviewees acknowledged the **repeatability**: *“If you want to enable your client to continue the work after you left, then a tool is a good way to kind of bundle the knowledge that is created in a project and enable people to reuse it after you have left.” (Interviewee B, Paragraph 25)* which goes along with the **knowledge transfer** to the client, but also from senior to junior consultant. During the usage of the tool, it can serve various benefits also. It can **reduce the complexity** of issues, increase **transparency**, and **visualize** so that text can be consumed more easily. The **communication** within client groups and with the consultant is facilitated. Lastly, **information** can be **consolidated**, **references** to similar cases can be drawn and the line of **argumentation** can be supported.

Limitations

Several distinct elements were found explaining the benefits of tools in client projects. However, the interviewees relativized the power of tools as there are certain restrictions and pitfalls in their usage that must be considered to evaluate their relevance for project success. Interviewee H described a situation at a SME where the usage of tools lead to **artificially increased problems**, as the tool was construed for large MNEs and composed elements not relevant for the business size (Interviewee H, paragraph 16). Interviewee D stated that the usage of tools can be risky if the consultant **limits his or her thoughts** to the pre-defined questions given and overlooks other situation-specific parameters (Interviewee D, paragraph 27). For interviewee G, client **information** was usually **too complex** to be broken down to a tool and still include all relevant parts to fulfill the activity (Interviewee G, paragraph 9). Consequently, he regarded textbook tools as an inspiration which cannot be directly applied. Further, some consultants referred to the tool as only a support element in an **individually designed solution**. The tool was seen as an “approximation” to the individual problems (Interviewee G, paragraph 9). Interviewee D explained the necessity of the tool to be completely understood by all project participants in order for it to be valuable: *“But if I just use a tool, here's a strategy map. This is your new strategy. And if they're not familiar with it because, if you ask 100 people, maybe 20 know what a strategy map is and understand what the different fields mean. So, you can use that. But you also have to translate it to everyone.” (Interviewee D, Paragraph 17)* The general perception of seven of the interviewed consultants was that the relevance of tools might be overestimated by theory and academia and that tools should not define the core of the work (Interviewee B, paragraph 43; Interviewee C, paragraph 36 – 37; Interviewee D, paragraph 27;

Interviewee E, paragraph 90; Interviewee G, paragraph 25; Interviewee J, paragraph 32; Interviewee K, paragraph 6). Simultaneously, another set of competences was highlighted by five consultants as more decisive: **Interpersonal factors** (Interviewee A, paragraph 44; Interviewee C, paragraph 37; Interviewee D, paragraph 27; Interviewee E, paragraph 78). The consultants perceive the ability to listen and communicate and built a trustful relationship as the top skill to achieve consulting success.

“That consulting work is more accompanying your clients than just delivering a strict project according to specification. So this, of course, then goes more into like a personal relationship than just having tools. So that that might be one important aspect why tools are not the one and only solution to get clients.” (Interviewee G, Paragraph 31)

For Interviewee D, also functional knowledge about the topic, industry and country was equally important as interpersonal skills (Interviewee D, paragraph 27).

4.3 Mechanisms Underlying the Deployment of Tools

Finally, the research question shall be answered: *“How do strategy consultants successfully deploy strategy tools in their client projects?”*. Throughout the data analysis, five distinct themes were identified which describe the mechanisms that underlie strategy consultants in the selection process and application of successful tools for their client projects. The emerging themes will be elaborated in this chapter.

4.3.1 Activity-related Factors

The first theme identified displays that interviewees deploy tools depending on the different key activities that they are responsible for.

Project phases

In order to identify a suitable tool, several consultants considered the current project phase. This goes hand in hand with project type and size, as the number and duration of phases depends on it.

“So, for every phase we have different tools that we select based on the type of project and size of project.” (Interviewee B, paragraph 8)

Tools were categorized and chosen according to their function, whether they are more helpful in the beginning or in the progressing project time. The following functions were mentioned: ‘Data Collection’, ‘Understanding the Problem’, ‘Solution Finding’ and ‘Decision Making’. As an example, Interviewee A talked about the tool ‘the five WHYs’ as suitable for Understanding the Problem: *“then you can use the 5 WHY questions because if you have a small project to*

improve a machine, you have to find out why we have a problem. And to go deep in details, to find out the root cause, for me it's very important to ask the members of the team and with 5 WHY you can go deeper and deeper in the project.” (Interviewee A, paragraph 15) Root cause analysis was also mentioned by Interviewee I as a key activity in this phase, done with the ‘Ishikawa’ diagram (Interviewee I, paragraph 10). Interviewee C described the strength of brainstorming tools, such as mind maps, in the creative phases such as Solution Finding. Also Interviewee A connected Solution Finding to creativity, working for instance with the ‘Six Thinking Hats’ and ‘Walt Disney’ Tool.

Regarding the intensity of usage of tools in the different phases, one could see that it varied from participant to participant. The majority of consultants declared no visible difference in intensity. However, two consultants noticed a very opposing difference. For Interviewee B, the benefit of tools clearly appeared at project start:

“The earlier we are in the project, the more we use tools because it's more generic. Soon as we reach later stages in the project, it becomes very individual to the client and then we tend to use less standardized tools and more individual approaches and tools developed for this client, right?” (Interviewee B, paragraph 12). On the other hand, interviewee F saw the key in the first stages, such as analysis, as strong communication with the customer, rather than working with tools. *“The beginning of projects is very individual, however, the more I “climb up”, the more I can make use of tools”. (Interviewee F, paragraph 36).*

Due to time restrictions given by the client side, the usage of tools in the first phases might be minimized. However, this was identified as a risk factor: Interviewee H observed that the lack of a thorough identification of root causes and coherences will lead to a more difficult and time-consuming solution finding phase (Interviewee H, paragraph 19). Further, Interviewee J explained that tool deployment is flexible over project time, meaning that depending on the development tools may be added or deleted during the phases (Interviewee J, paragraph 11).

Two consultants stated that their choice of tools is independent from project phase. From their point of view, each tool can be applicable in any phase, depending on the need. *“SWOT analysis of course can be done in the initial phase and analysis phase, but a SWOT analysis can also be done when the strategy is formulated, right? So, just try to figure it out.” (Interviewee D, paragraph 9)*

For Interviewee E, other factors such as the client personality overweighed the need to choose tools according to project phases. This factor will be elaborated in the next chapter.

“There's nothing. I would not say this is a tool I just use for that phase of the project because it often depends on the people you are working with. Which tool is better for use and which isn't okay.” (Interviewee E, paragraph 29)

Workshops

Workshops shall be mentioned as a separate activity, as they can be applicable in all project phases. Interviewee C stated that his choice of tools is focused on communication-enhancing tools, which are mainly applied in workshops. He explains the importance of “small and easy” tools, such as the 6-5-3 Method. Also, the “Product Canvas” and “Role Model Canvas” were given as examples (Interviewee C, paragraph 11). Interviewee D talked about the benefits of physical strategy maps in on-site workshops (Interviewee D, paragraph 25).

Project Topic

Lastly, the activities and thus needed tools could be defined by the consulting topic. For example, a market study is characterized by the need to evaluate the overall competitive environment. Consequently, the successful tools will involve competitor analysis, such as benchmarking (Interviewee D, paragraph 9). Another example was given by Interviewee B, who called the tools that are categorized according to the topic “consulting assets”. A possible domain here is sourcing strategy, which involves tools only applicable in this domain (interviewee B, paragraph 8).

4.3.2 Client Characteristic-related Factors

Apart from Interviewee J, who could not identify any client characteristics as decisive for the tool selection process (Interviewee J, paragraph 13), every participant mentioned certain client-related factors.

Tool expertise

One characteristic that influenced the deployment of tools was the expertise in tools of the project participants. The interviewees described the level of know-how of their clients as very diverse, from project to project but also within a project. The expertise could depend on various factors. First of all, the level of hierarchy was decisive. Here, one could find two opposing views on how to deal with tools. On the one hand, the management level usually had time-restrictions and a fully engaged mental capacity, which restricted the ability to understand complex tools (Interviewee G, paragraph 11). As a consequence, *“The tools have to be quicker, so they must be immediately understandable. And everything is done on a higher consolidated level.” (Interviewee I, paragraph 26)* Or as Interviewee G described it: *“if you're a C-level*

management, you just want to know very generic things, you know, like what would be an interface there and how would that work?” (Interviewee G, paragraph 17). From their point of view, more detailed and complex tools shall be used when working with experts in the company.

Another argumentation was that C-Level (C=Chief, executive circle) employees often had a background in consulting or business administration themselves, so accordingly they had more knowledge of strategy tools or understand the thought-patterns quicker. From this logic, it would be possible to use more complex tools in the collaboration with C-Level managers. Project participants who were lateral recruits from different sectors, such as public sector employees from governmental entities, would be less familiar (Interviewee D, paragraph 13).

“Here are exceptions, of course, but usually management has an idea of what strategy work, what analysis is about. If you show them something, most of the time you are that intuitive for them.” (Interviewee G, paragraph 21)

Besides the hierarchy level, also the department was relevant. Certain departments were familiar with certain strategy tools because they are applicable in the daily work. For example, sales departments often categorized clients according to the ABC or Pareto analysis. Marketing often employed persona analysis to characterize the market participants. Accordingly, the consultants had to put more effort in explaining the tools to employees from distant departments (Interviewee J, paragraph 21).

The decisions on how to work with tools was even more complex if the participants were very heterogenous in any factor mentioned. Heterogeneity increased the time and effort that has to be invested in explaining the tools applied. *“We usually have people from different sections in our workshops, procurement, finance, so all the guys and of course they have different know how and interest in the process. So this is definitely something you have to cover, not necessarily by using different methods. So that's what I meant before. You have to explain them why I'm using this method right now, what should be the outcome, what I'm going to do with the outcome.” (Interviewee K, paragraph 14)*

The interviewees agreed that tools should be chosen according to the client know-how. Interviewee F explains: *„If I insist on using my tools, the client must acclimatize with them first. This means enhanced effort. Not many clients like this, as they don't have capacity and patience.” (Interviewee F, paragraph 48)* In general, the consultants agree that no matter how high the expertise, the highest benefit arises from easy-to-use tools. *“[...] and this is valid for*

all levels, the easier you make the tool applicable, the better it will be accepted and the better the generated output will be.” (Interviewee H, paragraph 12)

Long-term adaptation

According to some interviews, some clients might be interested in getting new tool input that they can also integrate in their daily work after the project. Interviewee C and F described this willingness of their clients especially for less-known tools. (Interviewee C, paragraph 19; Interviewee F, paragraph 44). In consequence, more effort needed to be put in documentation and description of these tools. Interviewee E explained that from her perception, the clients rarely applied the tools in their daily work, however they would ask upcoming consultants to work with similar tools (Interviewee E, paragraph 49).

Expectations to use tools

The clients also challenged the interviewees with their expectations towards tool application. One argument was that they anticipated certain tools because they have limited time to integrate them in daily business, for instance regarding creativity tools. (Interviewee A, paragraph 28). While some wanted to use the consulting project to invest time into tool application, others specifically asked for more efficiency at the expense of quality by using tools: *“some clients actually actively ask us to use standardized approaches and tools to increase efficiency, and in such a case we might be open to using tools that are only applicable at a certain degree, so they might only be apply to 70 or 80% to this specific case, but because that's the agreement with the customer, we would still use a tool just to increase efficiency in the project.”* (Interviewee B, paragraph 19) Some clients might have even asked for particular tools: *“I also experienced that actually and in a recent project where they definitely asked, we have to do the strategy based on a balanced scorecard. So they actually asked for a certain tool or a certain approach that we have to apply.”* (Interviewee D, paragraph 15)

Interviewee B explained that in certain areas, the client has developed own tools that shall also be applied by the consultant: *“One area where this is really common, for example, is risk management. Most larger companies already have their own tools and methodology for risk management and want people to use them.”* (Interviewee B, paragraph 21)

Other interviewees described their clients as more relaxed towards tool usage. They trusted in the expertise of the consultant to apply the right tool at the right time (Interviewee E, paragraph 37).

Reluctance vs. open-mindedness

Lastly, the deployment of tools was influenced by the degree of open-mindedness of the client. The consultants tried to evaluate from the first encounter, whether the client and the employees were welcoming the work with tools, value it or are even impressed. Interviewee F stated that her clients were generally happy about the introduction of tools to support the lines of argumentation for the strategy development (Interviewee F, paragraph 14). Also Interviewee B says that while there might be some employees who were concerned about working with consultants in general or about the project goal, he usually faced consent with the facilitation of work by the usage of tools (Interviewee B, paragraph 23).

Others, such as Interviewee D, explained that they made different experiences. While some were open-minded, others were more restricted towards the deployment of tools. (Interviewee D, paragraph 13). Some employees might have wanted to skip certain phases in order to move quicker through the project. Interviewee H explained that tools for analysis might have been rejected as the problem is considered as clear. However, this proceeding usually backlashed as a well-articulated problem is needed to find goal-oriented solutions (Interviewee H, paragraph 18). In these cases, the interviewee H stated that she invested into explaining the advantage of the tools from a different perspective (interviewee H, paragraph 12). Interviewee K also experienced reluctance which could be attributed to the corporate culture. He tried to deploy a creative tool, a Persona, in an engineering firm with a more analytical mindset. The tool did not resonate with the group, as they could not understand the additional effort that had to be invested in this creative tool (Interviewee K, paragraph 16). In order to avoid such cases in the future, he drew the following consequence for the tool deployment: *“But at least in the acquisition phase, when you first meet your potential client, you get a certain feeling of what is the culture in the company. And these are questions we ask directly. What kind of profile people are in the leadership team? What's the culture? What's important for them?”* (Interviewee K, Paragraph 19) Also Interviewee E described that one might opt for more analytical tools, possibly with quantitative results, as the benefit has to be made tangible to convince the critics (Interviewee E, paragraph 33).

4.3.3 Industry-related Factors

In the interviews, certain tool-deployment factors were found that relate to the specific properties of different industries. First of all, certain restrictions in the choice of tools were given by legal standards. This was specifically important for the healthcare sector. Interviewee

A has been working for projects related to the US market and thus had to follow the FDA guidelines in terms of documentation tools (Interviewee A, paragraph 30-32). Also, market restrictions were common in some industries. The automotive suppliers have a strong dependence on first tier producers and thus must follow their wishes with regard to documentation (Interviewee A, paragraph 30). Besides the restriction in tool choice, Interviewee B described the usage of tools in highly regulated sectors as facilitated: *“you have a lot of laws covering the conduct of companies or organizations in the public sector, then it's easier to apply tools because basically what a tool does is it takes these external factors and makes them usable”* (Interviewee B, paragraph 17).

It could be seen that for the interviewed consultants, the perception of industry differences in terms of tool usage was not similar. Interviewee F stated that a challenge for some industries can also be their saturation of consulting work. In the automotive industry, from her point of view, many companies were very experienced and were thus harder to persuade of new tools, while this would be different for example for engineering companies (Interviewee F, paragraph 60). For Interviewee H, many frameworks were applicable to different industries, only the content had to be changed (Interviewee H, paragraph 14). Some interviewees were convinced that the deployment of tools did not relate to the industry at all. For Interviewee C, it was only depending on the individual client characteristics, stating that he could apply his toolbox in any sector (Interviewee C, paragraph 21). Interviewee D had a similar opinion: *“I think I didn't do special differentiation between working with someone maybe from the packaging industry or someone working in the in the defense industry. So in the end of the day, strategy development is strategy development and should not be influenced by any industry.”* (Interviewee D, paragraph 21)

4.3.4 Consultant Background-related Factors

A huge influential factor regarding the consultants' deployment of tools for their project success were the individual professional and educational backgrounds and the resulting toolkit compositions.

Educational background and training

Several interviewees stated that their first encounters with consulting tools were during their academical trainings. The interviewees generally described it as their know-how foundation, which was differently perceived as relevant also in their professional career. Interviewee I estimated that 30% of his today's toolkit was acquired during his studies (Interviewee I,

paragraph 28). For Interviewee D, the number of tools he met during his studies was significant, however the courses lacked an application training completely (Interviewee D, paragraph 23). This was different for Interviewee H, who had the chance to apply the tools with experienced fellow students in real-life case studies (Interviewee H, paragraph 22). Besides the academical education, many interviewees mentioned further courses and trainings where they gained theoretical tool input. These trainings were specifically taken to diversify their skill set and specialize in focus areas. Some examples given were project management, mediation and coaching. Interviewee K gave courses himself at a university to also gain insights and ideas for knew tool trends (Interviewee K, paragraph 23). One could see that gaining theoretical knowledge is important to many interviewees in order to find the right tool deployment strategy for their client projects. However, the gap between theory and reality was also emphasized: *“But more important than knowing how to use a tool and when you use it is to know when not to use it and how not to use it and that is something you only learn in in practically experience.”* (Interviewee B, Paragraph 31)

Practical experience

Depending on the professional path taken, each interviewee described learnings during their practical experience that guided them on the deployment of strategy tools. A large influence could be found in the collaboration with other (senior) consultants. Some interviewees had the chance to learn from a mentor or buddy during their first years, which they could observe in the client environment and consult in making tool decisions (Interviewee F, paragraph 72; Interviewee H, paragraph 24). Others also used the chance to discuss the proceeding in their projects with colleagues, exchanging about precedents they encountered and assessments of the customer character (Interviewee D, paragraph 23; Interviewee E, paragraph 78; Interviewee C, paragraph 27). Several interviewees advised others to ask for feedback, and also lived this culture in their firm: *“You would work one on one or maybe two people together in a small team and work on situations without that hierarchical order and more dialogue and have more time and more ability to focus on individual presentation of information, problem solving.”* (Interviewee G, Paragraph 25). Another theme that was recognized was the relevance of failure for enhancing the work with tools. The interviewees described several situations where the tool-situation-fit was not given, or miscommunication led to dissatisfaction of the client. Interviewee I gave the example of a workshop, where the tool, a Key Performance Indicator Pyramid was chosen together. However, the implementation was expected differently from the client, as he

would have preferred a filled Pyramid from the consultant, while the consultant wanted to do the content collaboratively (Interviewee I, paragraph 22). In other cases, the chosen tool was not applicable for the desired outcome (Interviewee E, paragraph 65). These situations were inconvenient, yet played an important role in developing the consultant's know-how and sensitivity for client specificities and ultimately for the successful tool deployment.

Toolkit composition

Resulting from the individual background, each consultant had a specific way to structure and develop their tool kit, which influences the tool deployment. First of all, different opinions were given regarding the optimal size of the toolkit. For Interviewee A, a large tool kit is beneficial as more options could be chosen in individual situations (Interviewee A, paragraph 38). Similarly, Interviewee B started to collect a huge tool kit as a junior consultant, and after structuring it according to topics, was now able to choose and share the tools (Interviewee B, paragraph 29). The opposing view is supported by Interviewees C, D and E. After collecting tools over the years, they recognized that they mainly use a small amount of five to ten tools that they feel the most comfortable with and which they can adapt and reconstruct given the needs of the project (Interviewee C, paragraph 23; Interviewee D, paragraph 23; Interviewee E, paragraph 90). Interviewee I explained that there is also a potential pitfall of working only with the most familiar tools, as it can happen that consultants choose tools only for convenience but which do not match the indented outcome (Interviewee I, paragraph 16). Some consultants noticed that they use tools which are valid since several years, as for example the SWOT analysis, Porter's 5 Forces or Ishikawa. These tools are on the one hand beneficial as they are known by many clients already, but also their logic was not outdone by any new emerging tool (Interviewee K, paragraph 6). However, the interviewees also continuously developed and challenge their toolkit (Interviewee C, paragraph 27; Interviewee F, paragraph 76; Interviewee H, paragraph 28). For Interviewee I, it was necessary also to dive into related consulting field-tools to keep a competitive advantage and be broadly positioned in times of crisis (Interviewee I, paragraph 30). Also Interviewee D noticed a spillover of various consulting fields to strategy consulting, for instance change management, agile and classical project management, which was necessary to gain different perspectives (Interviewee D, paragraph 29).

Personal asset-building

The last factor that was identified in the course of the interviews is the aspiration to stand out with a self-built tools or the re-building of existing tools. During their career the consultants

noticed that tools were not always able to capture the complexity of an issue or that some elements or questions had to be added. Further, Interviewee B mentioned an intrinsic goal to create an own asset that cannot be found at the competitor (Interviewee B, paragraph 35). On the one hand, this meant that existing textbook tools were adapted and put together (Interviewee H, paragraph 8, Interviewee J, paragraph 32). On the other hand, when the consultants realized that no existing tool would be able to meet their individual needs, also completely new tools were built. These tools were often not standalone but combined with technology (Interviewee B, paragraph 35, Interviewee E, paragraph 66; Interviewee G, paragraph 13).

4.3.5 Remote Work-related Factors

Especially arising from the consequences of the Covid 19 pandemic, a new theme emerged that needed attention of consultants in deploying tools. Only one of the study participants could not approve a change in the way tools were deployed with regard to remote work (Interviewee D, paragraph 25). The other participants noticed several challenges and new conditions. Interviewee K had learned that in the online world, a deeper preparation of tools was needed. He stated that offline, in case of reluctance of a client towards a tool, he could easily adapt material on whiteboards and choose a different strategy to reach out to the client. Online, due to the lack of personal interactions, templates and boards had to be prepared in advance for better understanding. A change in schedule would thus be more difficult if alternatives were not prepared (Interviewee K, paragraph 16). Interviewee C saw the lack of physical writing with pen and paper as creativity-disrupting in online workshops (Interviewee C, paragraph 31). He expressed a need to identify how tools can be adapted online to have the same potential as offline. The lack of personal interaction in the online world needed to be balanced out.

5 Discussion of the Findings

Due to time and resource restrictions and to ensure validity of results, a sampling criterium was the employment in Germany. The results shall thus be discussed in the light of validity in the German strategy consulting sector. The interviewees had similar perceptions of the definition of consulting success. This observation implies comparability of results regarding the research question, as the tool deployment was regarded as a factor to success. Quantifiable as well as non-quantifiable indicators were used: Time, budget and scope on the one hand as distinct values that can be measured, and client satisfaction and sustainable improvement on the other hand as more interpretive factors. This two-sided definition can equally be found in theory, as seen in chapter 2.1. It shows that consultants have a focus on tangible and intangible values of their work. Thus, the consultant's work does not stop by delivering the agreed results, but goes beyond, digging into client's personal preferences. The competences of the consultant, interpersonal, functional and methodological, must be aligned in a way that it is efficient in reaching the project triangle but also meet the expectations on the interpersonal level. Especially the tension mentioned by Interviewee B, that a prejudice against strategy consultants persists, needs special attention (Interviewee B, Paragraph 19). In a next step, it was analysed whether the study participants are dealing with the conflicting character of tools, as this was the second basis of argumentation for the research question.

The analysis of the interviewees' views towards tool benefits and limitations confirmed the view that tool usage has both positive and negative aspects. The benefits given in the study results can also be found in the argumentation of scholars on the benefits of strategy tools for managers. The three most mentioned benefits were structure, efficiency and signalling competence. Structure and efficiency is in line with the dominant *raison d'être* of tools in literature (Gunn & Williams, 2007; Schawel & Billing, 2012; Zerfaß & Volk, 2019). Signalling competence is equally found as demonstrating rationality and inducing acceptance in literature. One can draw an analogy to the principal-agent theory which is often studied in the context of consultancy (Nissen, 2007). Since the client, as a principal, wants to reduce his or her information disadvantage about the consultant's competences, the strategy tools provide an opportunity for the consultant as an agent to demonstrate their rational behaviour and ability to help the client.

It could be seen that the various benefits mentioned represent at the same time the risks for limitations. To give some examples, the limitation of thoughts can be regarded as a counterargument for the provision of a clear structure. Further, limitations of capturing all relevant parts are arising as a negative consequence from the reduced complexity and consolidation of information. Lastly, loss of individuality can be seen as a risk due to the aim to increase repeatability and draw references. Once again, the argumentation of the literature is supported that it is the responsibility of the consultant to draw on the tools benefits while minimizing the risks for the defaults. The consultant needs to modify, customize and adapt textbook tools to the client issue, being able to transfer the results of tools into action steps and draw recommendations to the client. This conclusion was reflected in the statements of several interviewees. They regarded the value of consulting in transferring the tool to the applied case. The relevance of tools as a success factor is thus dependent on the consultant's ability to transform the tool into an asset. This understanding of tool deployment is also related to the power dynamics found in literature. Due to the shift of knowledge leadership towards the client organisation, the consultants fear being stigmatized as providing "assembly line" solutions. There is a need to proof their competences through the application of tools.

Analysing the purpose and limitations of the toolbox, the rationale of the literature that the value of tools arises from the abilities of the consultants themselves has been validated in the study sample. As such, the research question was proven to be relevant and in the next part, the mechanisms behind overcoming the tension and applying tools successfully shall be evaluated.

Ultimately, the research question "*How do strategy consultants successfully deploy strategy tools in their client projects?*" shall be answered. Five distinct themes were identified explaining how strategy consultants deploy tools to achieve success in their client projects. The themes contain the found variables consultants consider in their tool deployment strategy and the implications arising from different characteristics of the variables.

The first theme was **activity-related factors**. It was seen that several consultants make use of project phase-models developed by theory and practice. The phase models differ in number of phases, however they all aim at displaying the ideal consulting process from acquisition to closure (Andler, 2011; Block, 2000; Lippold, 2018; Wickham & Wilcock, 2020). Several consultants used these to categorize their toolkit and find the most suitable tool-activity fit.

Even though tools might be suitable for various phases, a loose allocation was done according to the focus of the tools, for instance, data collection tools were mentioned in the beginning of the process, such as the analysis phase, while creativity tools were mostly applicable to the solution finding phase. Two opposing opinions regarding the tool intensity in different phases demonstrated that no cluster can be identified in the research. The decision to work with tools in a certain phase should always be based on the client's needs, which was shown by Interviewee H. In her case, the analysis phase was not sufficiently elaborated, leading to a lack of information basis for solution finding. One can conclude that if the usage of phase models is applicable in the consultant's context, before the start the necessity to use tools for all stages has to be evaluated. Later in the project, the tools shall be reflected to ensure completeness of information. Also for consultants not applying phase models, workshops displayed a critical element of projects in which tools are regularly applied. Here, the deployment of easy-to-digest and communication-enhancing tools was found as critical to success. The argumentation for communication-enhancing qualities of tools is also reflected in previous literature. Bamberg and Wrona identify it as one of the three key purposes of strategy tools for consultants (Bamberger & Wrona, 2012). The last finding was that depending on individual consultant's topic focus, also the intensity of certain tools varies. This implies that for strategy consultants focusing on a specific sub domain of strategy, the knowledge base of tools in this field should be expanded.

The second theme that was identified for the successful deployment of tools were **client characteristic-related factors**. Within this theme, four variables could be differentiated. Regarding the first one, tool expertise of clients, hierarchy, department belonging and heterogeneity of project participants were identified as pivotal points. As per definition, the work of the strategy consultants interviewed was mainly directed towards C-Level employees. However, there was a different opinion on how to deal with this stakeholder group in terms of tool deployment. The first logic was that due to their experience and education C-Level employees have a higher understanding also of complex tools. The opposing view claimed that C-Level employees need simple demonstrations and reduced complexity due to their capacity restrictions. Both argumentations are profound. It shows that there is no single-right solution for the involvement of C-Level into the tool deployment, but it depends on their prioritization and aim, and clear communication of needs is necessary. While for hierarchy levels one could

find a contradiction, the influence of department belonging on tool deployment was more straight forward. From the daily work, certain departments will have a higher affinity to tools as others, which leads to a choice of more complex tools and less explanation. The complexity increases when consultants are faced with a heterogeneous group, either in terms of department or hierarchy. One could see that the consultants need to do a balancing act to cover expectations and know-how of all participants. However, easy-to-use tools were found successful for all levels of expertise. As such, the consultants should not be overly attentional to providing complex tools for experts, but can save explanation time while reaching success by opting for tools digestible for all levels within the group.

Long-term adaptation was a second variable found at clients. The willingness to work with the tools across projects implies a deeper involvement of the client in the tool choice and thorough explanation. The consultant shall identify this client wish at an early stage to prepare the necessary documentation conscientiously.

The third variable, expectations, had various dimensions. Some consultants described to have completely free hand, while others were restricted by clients to use specific, sometimes self-developed tools, occasionally even at the expense of achieving the best results. It becomes obvious that a clear interrogation of expectations by the consultant is necessary to satisfy the client. Expectations of the client can on the one hand be beneficial because needs are openly communicated, and the methods are well-known and established in the business process (Interviewee F, paragraph 48). On the other hand, they can be detrimental if the consultant discovers the expected tool does not match with the information input or the intended outcome he or she wants to achieve (Interviewee G, paragraph 19; Interviewee G, paragraph 29; Interviewee K, paragraph 16). In these cases, the consultants need an outstanding tactfulness to demonstrate the need for other tools. The dynamics found in the expression of expectations by the interviewees supports the power dynamic shift found in literature on interpersonal success factors (Campagnolo, 2013). Due to an increased knowledge base, the clients are also more able to evaluate their tool needs. To conclude, the consultant cannot impose their strategy without clear justification of tool choice.

The fourth variable was the degree of open-mindedness. It was generally noticed that the interviewees had made different experiences in this context. The degree of openness shall be evaluated through personal interaction, and emotional intelligence is needed to draw an assessment. Here one can assume an interaction with interpersonal success factors from

literature. The C-C relationship, specifically constructive exchange and interpersonal compatibility, can be crucial in identifying the client's openness towards tools (Lallier Beaudoin et al., 2022). If the degree of openness is perceived as high, the tool deployment will be impacted as more options can be drawn and maybe also unconventional, experimental tools can be used to achieve project success. On the other hand, tool reluctance requires additional persuasion power. Certain biases of the client, such as the skipping of analysis tools, might be countered by giving precedents of former successful and unsuccessful projects. Other issues, such as a creativity-inhibiting corporate culture, will not be possible to solve within the short time frame of a consulting project. Therefore, the consultant must deploy tools that resonate with the mindset of the respective client.

Industry-related factors comprised the third theme considered in strategy consultants' tool deployment. For certain industries, legal standards as well as guidelines along the vertical value chain were providing a contextual frame for strategy consultants which could not be circumvented. Followingly, consultants failing to meet these formal or informal requirements will most likely lose legitimacy at the client. This is supported by the functional success factors found in literature, explaining that a deep know-how of the industry is among the top customer satisfaction drivers (Haverila et al., 2011). These restrictions provide an opportunity for successful tool deployment as the standardization of projects increases and followingly the risk that a tool overlooks pivotal points is minimised. Apart from the industries characterised by high regulation, the perception of industry differences was not similar among the interviewees, which impedes clear results of the research in this theme. The prevalent argumentation was that tool deployment is individually assessed at each client, as the corporate cultures and experiences can differ also within an industry.

After the first three themes were rather client- and project-focused, the fourth theme, **consultant background-related factors**, integrated the consultants' personal history into tool deployment. Four main variables were found to be influential. The educational background of all interviewees laid the foundation for the way tools were chosen and applied in the professional career. The skills to deploy tools in reality benefited when theory was combined with an application training. Therefore, consultants shall make use of offers by universities and employers to practice their skills. Further training shall target the specific foci chosen in the

career as well as diversify the skill set and keep up with new tool developments. A possible implication is that the consultant can signal the ability to find the most suitable tool deployment strategy for the client and thus gain trust in the tool choices.

Practical experience was the second consultant-background related variable. One could see a positive relationship between cooperation and successful tool deployment. Either through mentor programs or teamwork consultants can reassure their assessment of the right tool deployment strategy. The implication can be increased confidence in stepping towards the customer. The practical experience also enables improving through failure. Miscommunication and a lack of tool-activity fit were challenges often faced. It could be seen that these challenges play an important role in developing the consultant's sensitivity for client specificities and ultimately for the successful tool deployment. The implication can be a better intuition for tool success afterwards.

For the third variable, tool kit composition, one could once again see a variety of approaches of the interviewees. While some consultants worked with an extensive number of tools, the prevalent opinion was that consultants should aim for a concentrated toolkit of up to ten adaptable tools. This can ensure a wide knowledge base without being overwhelmed by too many options. Some tools are valid over time and could not be outdated. Yet, as the risk of not finding a tool-activity-fit persists, an openness towards new tool developments is recommended. The consequence for successful tool deployment is the creation of a solid expertise in a small number of tools while continuously challenging the existing know-how.

Personal asset-building as a fourth variable goes hand in hand with the tool kit composition. The deployment of tools was influenced by limitations of the existing toolbox and the competitive drive to create a unique asset. One consequence is the re-construction of textbook tools or creation of own tools. The capability to creatively combine elements of other tools and maybe combine them with a technology can be a critical success factor to win over clients and satisfy their needs in the project. A second consequence for the deployment of tools can be that consultants who work more with self-built tools are more flexible to adapt them quickly to unfamiliar situations. When comparing the results to the empirical findings on strategy tools by Gunn and Williams, one can assume that the usage of self-built tools will be dominated by practically trained strategy consultants. According to Gunn and Williams, corporate managers whose career was focused on practical experience rather than academical tend to use practically developed tools (Gunn & Williams, 2007). Future research could elaborate whether the

capability to work with self-built tools is also more present for professionally trained consultants.

As an outstanding fifth theme, **remote work-related factors** had to be considered as the majority of interviewees perceived an influence on the deployment of tools. The main variable was the increased uncertainty of online projects. The implication drawn is the need for more thorough preparation of the tool application in advance. One can assume that the lack of personal interactions, subconscious signals and body language impede the identification of the participant's satisfaction. The key to success can thus be a preparation of alternatives to the chosen tool. Additionally, a way to capture emotions and reactions can support, for example virtual mood boards. A second challenge found was the disruption of creative processes, for example due to digital writing. Handwriting has been scientifically proven to enhance creative processes and stimulate brain areas responsible for information storage (Schmermund, 2020). A possible implication is the usage of tablets and surface pens, which is the best possibility to enable drawing and handwriting in the digital world.

Overall, the findings demonstrate that the different success factors in the consulting project can be connected. Several aspects underpinned the interrelations between tool deployment as a methodological success factor and interpersonal as well as functional success factors. It was shown that the power dynamics between consultant are responsible for the rise of client expectations towards tools. At the same time, the C-C relationship is the basis for interpreting tool openness adequately. Further, the functional success factors, specifically the industry know-how, are indispensable for the proper tool choice in highly regulated markets.

6 Conceptual Framework

The conclusions drawn in the discussion were summarized into a conceptual framework. The purpose of the framework is to help especially junior consultants struggling with the tool choice as well as timing, application and communication to the client. It is structured according to the five themes that emerged in the study and includes self-assessment questions to reflect upon as well as practical implications that can possibly be drawn depending on the individual answers to the questions.

Figure 1 Conceptual Framework on Tool Deployment

Self-assessment Questionnaire to Successful Tool Deployment		
Theme	? Questions	! Possible Implications for Tool Strategy
  Activity-related Factors	Project phases: If project phases are applicable for structuring the projects: - Which focus of activities do I have in which phase? E.g., creative work, data collection, analytical thinking,... - Which tools match with the required activities? - Which tools are applicable over various phases or even universal? - Did I sufficiently uncover the client's needs? In which phase is the largest need for tool support due to information deficit? Can I ensure constant quality of results also if certain tools (or whole phases) are left out? Workshops: - Which tools can help me to enhance communication among the workshop participants? - Can I find an easy-to-digest tool without losing content or quality of results? Project topic: - In which topics do I need to intensify my tool knowledge?	- Tools are attributed to key activities - Toolkit structured according to project phases to gain overview, with certain tools in more than one phase - Long-term, anticipatory planning of tool usage to avoid additional time investment making up for missed out analysis - Flexibility throughout the project to adjust tool choice to the present needs - Workshop tools with optimal combination of communication-enhancing & easy-to-digest - Extensive tool set in subdomain of strategy consulting
  Client Characteristic-related Factors	Tool expertise: - If the target group are C-Level employees: what is their priority and aim within the project? - Is the target group a department familiar with the tools applied? - Is the target group heterogeneous in terms of backgrounds? Long-term adaptation: - Does the client want to adapt the tools used in the daily business? Expectations to use tools: - What expectations does the client have towards tool usage? Do the expectations match with the tool strategy planned? If not, how can the deviations be compensated? Reluctance vs. open-mindedness: - How open-minded is the target group towards the usage of tools? If there is reluctance, can prejudices or misconceptions be solved easily?	Depending on communicated interest of C-Level <pre> graph TD A[Depending on communicated interest of C-Level] --> B[complex tools due to high expertise and tool knowledge] A --> C[simple tools due to mental capacity restrictions] </pre> - Depending on degree of expertise and heterogeneity, less or more complex tools can be applied - HOWEVER: Easy-to-digest tools can reduce explanation time --> should be prioritized if output quality can be assured - If tools shall be adapted by client, time has to be calculated for deeper explanation and description hand-outs - In case of matching expectations, time savings possible - Otherwise persuasion techniques and empathy necessary to bring in other tools than expected - Ease of acceptance of (unconventional) tools for open-minded clients, while biases might be counter-acted through positive examples - Long-term issues such as creativity-inhibiting corporate cultures cannot be solved within project frame so that alternative solutions or work without tools must be considered
  Industry-related Factors	- Does the nature of the client's industry imply the usage of certain tools, for example due to legal requirements or guidelines along the value chain? - Do I face a highly regulated market with standardized projects?	- If restrictions due to the industry are given, the deployment of tools is guided, however chances for other tool usage, such as creative tools, shall be taken whenever possible - The standardization of projects decreases the risk that a tool overlooks pivotal points and consequently generic tools are more applicable
  Consultant Background-related Factors	Educational background and training: - Which learnings, theoretical and practical, do I bring into the project from educational courses and trainings regarding tool application? - Which offers do I have from my employer to further develop my tool deployment skills? Did I communicate my tool education properly to the client? Practical experience: - Which (more experienced) colleagues can I ask for advice in tool deployment? If the project is done in a team, which knowledge and tool kit does each team member bring in? - If a tool application does not work as expected, which lessons can I learn? Tool kit composition: - Can I increase the efficiency of my tool kit, in terms of overlaps between different tools? Which sources do I have if I need new tool input because a topic cannot be covered by my current tool kit? Personal asset-building: - Do I have the opportunity to outshine competition with a unique tool? Can I reconstruct or built an own tool if a certain task cannot be covered by textbook tools?	- Gaining certainty in tool application and eliminating tools which are not intuitive through application training in universities/ courses/... - Signalling tool skills to the client through certificates could also enhance trust on client side - Increasing confidence through re-assuring of tool choice with colleagues - Building a solid expertise in a small number of tools while continuously challenging the existing know-how - Meeting individual and special client needs through self-built tools
  Remote Work-related Factors	- Which risks for failure arise from the specific tool applied in remote work? - Did I prepare alternative solution paths in case the target group does not resonate with my tool idea? - How can I capture the feelings of the target group, e.g. through virtual mood boards? - How can I create a space for creativity?	- Finding ways to transfer offline tools to online world - Making up for the lack of personal interactions, subconscious signals and body language - Replicating physical writing as good as possible

7 Practical and Theoretical Contribution

The present master thesis attempted to add new insights to the research on management consulting success factors and strategy tools. Ultimately, the research question could be answered: “*How do strategy consultants successfully deploy strategy tools in their client projects?*”. Previous studies elaborated on strategy tools as an area of conflict between limitations and benefits, but the line of argumentation ended at the conclusion that the consultant has the responsibility to apply tools correctly. Further, the focus of success factors was put on the interpersonal and functional factors, with little attention to the relevance of and interaction with methodological factors.

No previous study, to the best of the author’s knowledge, has dealt with the underlying mechanisms of a successful consultant’s tool deployment. Consequently, the gap could be bridged between the conflicting character of strategy tools and how strategy consultants actually enable tools as a success factor. Five distinct themes could be identified, which include internal as well as external variables that have an impact on tool deployment. For each of the influential factors, possible implications that consultants can draw depending on the characteristic of their specific situation were derived. These implications were based partially on existing literature and partially derived from the interpretation of the interview statements. The reconciliation with existing literature additionally brought the insight that the deployment of tools, as a methodological success factor, is interdependent with interpersonal and functional success factors.

The practical contribution of the thesis lies in the conceptual framework developed especially for junior consultants. It shall give guidance on what variables to consider when choosing an appropriate tool deployment strategy in the consulting process. It contains the questions to reflect upon as well as possible consequences. Optimally, junior strategy consultants can make use of the self-assessment questionnaire to keep all relevant factors in mind when choosing a tool deployment strategy, without falling into the traps of the limitations described in literature. Further, it provides a possibility also for experienced strategy consulting practitioners to reflect on their own tool choices. Consultants may face the challenge of pressure to keep up with tool trends and notice inefficiencies in their tool deployment strategy, such as reluctance from clients. The questionnaire can help to discover subconscious mechanisms which the consultant might be routine-blinded for.

8 Limitations and Implications for Future Research

Certain limitations must be taken into account when interpreting the results. First of all, the theoretical background is limited due to a lack of extensive literature basis for strategy tools and methodological success factors. In consequence, an exploratory study with an interpretivist research philosophy was considered applicable. This implied the opportunity to investigate the experiences of consultants in practice, find patterns and provide alternative explanations for the various mechanisms found. Secondly, some limitations arose from the methodology of the qualitative research. Due to time restrictions, the master thesis was focused on tools in strategy consulting, not management consulting as a whole discipline. It would be an interesting approach for future research to extend the findings to other management consulting fields and compare the mechanisms found. Additionally, the format of expert interviews bears a risk towards reliability related to bias and transferability. However, the expert interviews were chosen as appropriate after reflecting on the explorative nature of tool deployment, which implied that thought patterns of consultant had to be studied in-depth. Further, it was aimed for careful preparation of the semi-structured interviews to avoid bias, such as the use of open and probing questions to reach internal validity. The research results are further limited due to the sample size of 12 interview partners with an imbalance of male and female participants, which can be attributed to the time restrictions as well as the poor responsiveness of cold calls. On the one hand, the sampling was impeded by the tense time schedules of consultants, on the other hand due to weak external incentives. Apart from research results offered in return, it was appealed for altruism of the sample candidates. Here, future research may extend the work with a larger sample size to get an even broader understanding of the mechanisms and maybe add additional themes that could not be uncovered within the current work. To ensure validity of results, another restriction of the sample was the employment in Germany. Another implication for future research is thus the extension to other geographical consulting markets.

The results of the thesis further provided first evidence for an interconnectedness of success factors. While former researchers had studied the impact on different interpersonal, functional and methodological factors on consulting success separately, no investigations have been done before regarding the dependencies and influences between these factors in the impact on consulting success. This can be an interesting topic to further investigate because it may help consultants to understand better their value creation processes, optimize their performance and ultimately achieve customer retention.

9 Conclusion

The aim of the thesis was to understand the underlying mechanisms of a successful consultant's tool deployment strategy. The research question was posed inductively, as no existing theory on tool deployment could be tested. Consequently, an interpretivist research philosophy was taken in order to make room for various world views of the consultants interviewed, with the aim to identify common patterns and at the same time demonstrate the differences and find explanations for tool decisions that may seem contradictory. The analysis of the consultant's view of the benefits and limitations of tools supported the rationale given in theory, which was a prerequisite to study the research question in the given sample. With the help of existing theory and interpretations, five variables and their characteristics could be identified and clustered: activity-related factors, client characteristic-related factors, industry-related factors, consultant background-related factors and remote work-related factors. Their implications for action steps regarding tool choice, tool application, tool timing and tool documentation could be drawn. From these insights, ultimately a conceptual framework could be developed which aims to break down subconscious mechanisms to simple questions and additionally provide possible hands-on implications for action steps depending on which underlying logic the consultant is following. The partially conflicting answers to the questions supported the choice of an interpretivist approach, as each consultant developed their own world views and views on tools from their individual experiences. These conflicts helped on the one hand to understand opposing tool choices as the motivations were analyzed. On the other hand, despite the contradictions, certain patterns could be found in the overall topics consultants care about. Finding these factors was a critical step for theory and practice, as it creates a clearer picture on value creation mechanisms in terms of methodological success factors.

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11 Appendix

Table 1 Sample Characteristics

Interviewee	Sex	Years of Experience	Specialisation	Size of organisation	Industries worked with
Interviewee A	M	15 years	IT Strategy	Small – 10 employees	Public Sector Industrial
Interviewee B	M	7 years	IT Strategy, IT Sourcing	Large – 1300 employees	Energy Financials
Interviewee C	M	12 years	Strategy Project Management	Small – 10 employees	F G Public Sector
Interviewee D	M	3 years	Strategy Finance	Large – 1100 employees	Industrial Public Sector
Interviewee E	F	6 years	Strategy Project Management	Small – 10 employees	Public Sector Chemistry
Interviewee F	F	20 years	Projectmanagem ent Manufacturing Strategy	Freelancer	Industrials FMCG Health Care Energy Automotive
Interviewee G	M	6 years	Innovation & Transformation Strategy	Small – 25 employees	Communication Information Technology Energy Automotive
Interviewee H	F	6 years	IT Strategy	Large – 700 000 employees,	Financials Public Sector Health Care FMCG

				15 000 in Industrial DACH	
Interviewee I	M	18 years	IT Strategy	Large – 1200 employees	Health Care FMCG Automotive Materials
Interviewee J	F	4 years	Strategy Transformation	Small – 10 employees	Retail
Interviewee K	M	10 years	Strategy	Small – 20 employees	Industrial Retail
Interviewee L	M	2 years	IT Strategy Project Management	Small – 10 employees	Public Sector

Figure 2 Interview Guideline

Thank you for taking the time and agreeing to help in the study. As the thesis is written in the English language, the interview will be held in English. If you have any objections, please let me know now. To facilitate the data analysis, the interview will be recorded. The recording will remain confidential, and all private data will be pseudonymized. You have the right to not answer any question and we can stop the interview at any time. A summary of the research findings can be provided to the interviewees.

The Time available is 45 Minutes.

The Research Question to be covered sounds as follows:

“How do strategy consultants successfully deploy strategy tools in their client projects?”. Tools can be regarded as a subset of the methodological competences of strategy consultants. As a result of the increased competitive pressure in the industry, tools, models and frameworks are developed to deliver and conceptualize ideas. In the “pool of tools” out there, it is accordingly difficult to find the most effective tools for the specific needs of the customer. The purpose of this master thesis is thus to understand the underlying mechanisms and consequences of a successful consultant’s tool strategy. Additionally, a conceptual framework shall be developed that can give guidance on what variables to consider when choosing an appropriate tool strategy in the consulting process.

Background details

Before proceeding, please give some information about your professional background

1. Name
2. Country currently employed
3. Field of specialization
4. Time spent working as a strategy consultant
5. Industries worked with
6. Size of company in employees

Interview themes

1. Consulting success:

Bronnenmayer et al. (2016) studied the relationship between success factors and success dimensions. They defined success as adherence to agreed financial goals and timing, meeting of agreed project results and acceptance of the proposed actions by the client organization.

- In your own words, when do you consider a consulting project as successfully completed?

2. Usage of Tools:

Tools in this master thesis are defined as: standardized method, which is modifiable to individual cases. The information input type is pre-defined, it should support in structuring thought patterns and it should guide the user’s actions to perform a certain activity in the project

- What is, from your point of view, the purpose of tools in the consulting project?
- When you think about tools you apply in your client projects – how would you cluster them? Maybe according to situations, functionality or topics covered?

- When you think about tools you apply in your client projects – how would you cluster them? Maybe according to situations, functionality or topics covered?
- Can you give examples for each category? Please, state the name and summarize in a few words.
- With which intensity do you use tools? Does it vary from type to type?
- When do you consider that you successfully applied a tool? Which outcome do you wish to achieve when using a consulting tool? Is there a difference for different types of tools?

1. Success factors:

- When choosing tools for different clients, do client characteristics influence your choice? If so, which client characteristics do you look at?
- What are the client expectations towards tools? Do clients request certain tools?
- Are clients open and willing to integrate tools into their daily work, also after projects are finished? How does it show?
- How is the group at the client composed, e.g. do you have to deal with different departments simultaneously? Or different hierarchy levels?
- Are clients knowledgeable of tools or is it mostly a new world for them?
- Did it ever occur to you that the tools chosen did not resonate with the client? How do you deal with reluctance to tools you apply?
- (if applicable) Did you actively differentiate your choice of tools for different industries? Why?
- Are there other characteristics of the client firm as an organization that have an influence on your choice of tools?
- Which challenges do you face when applying tools? What makes them more practical and easier to use?

2. Personal development:

- How did your repertoire of tools develop over time from the beginning of your career until now?
- From which sources do you get the tools that you use in your work?
- What advice would you give to junior consultants regarding the appliance of tools?
- Do you re-build tools or built tools from the scratch? If so, in which situations?

3. Influencing factors:

- Do you have experienced an influence on tools from other consulting fields?
- How did the choice of tools change since the increased prioritization of remote work?

4. Relevance for success:

- Which limitations do you see in the usage of tools?
- How would you define the relevance of tools as a success factor of your client projects?

We have reached the end of the interview. If you would like to make any further comments, feel free now. Thank you once again for your time and for participating in this research project.

Figure 3 Research Information Sheet

What are the most important tools in management consulting?

Research Information Sheet

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Nature of the research

Purpose: understand the underlying mechanisms and consequences of a successful consultant's tool strategy & develop a conceptual framework that can give guidance on choosing appropriate management consulting tools in the consulting process

Research Question: How do strategy consultants successfully deploy strategy tools in their client projects?

Sampling Frame: consultants in the field of strategy, German origin/ employed in German company, junior to senior, self-employed/ employees of firms of any size

Methodology

- Data will be collected in the form of semi-structured interviews
- interviewees will be asked to share their own thoughts, experiences and opinions on the research field
- the data collection will be conducted between 15th of September and 15th of November
- each interview shall take around 45 Minutes

Data Anonymity

- All personal data will be anonymised and pseudonyms will be used
- please try to mention as little personal data as possible (no names, locations, etc.) during the interview

Rights of participants

- participation is voluntary
- participants have the right to decline to answer a question or set of questions
- participants have control over the recording of any of their responses (voice recording)
- participants may withdraw at any time

Background Information

Definition of Tool

method or concept with a standardized scheme which is modifiable to individual cases. The information input type is pre-defined. It should support in structuring thought patterns, visualizing or simplifying and thus guide the user's actions to perform a certain activity.

Field of Consulting

Due to time and resource restrictions and to ensure reliability and validity of results, the study and the study results will be limited to the field of strategy management consulting.

Theoretical Background

Success Factors in Consulting

- Interpersonal - social skills and emotional intelligence: clear communication of expectations, feeling of partnership, trust and equal treatment
- Functional - educational and professional background: industry-, organizational functions- and consulting field- specific knowledge and experience
- Methodological - technological skills and **toolkit**: active listening, analytical skills, creativity, tactical conceptual abilities, data collection and evaluation

Tools - an area of conflict in theory and practice

practice and theory are discordant about the relevance of tools for consulting success. On the other hand, the contribution of tools to consulting success was questioned over time by researchers as the standardization by tools opposes the individual nature of client problems and complexity of issues cannot be covered due to oversimplification. Especially young professionals, who gained theoretical knowledge about tools in universities, struggle with the pitfall to blindly apply textbook tools without reflecting on the limitations. On the one hand, tools play a central role in signalling the ability to meet the promised performance to the clients, because they can contribute to reflective thinking and professionalised decision-making. Further, in practice several tools have been able to settle in the market and stay valid even over decades, such as Porter's Five Forces, the BCG Matrix or the SWOT analysis. The continuous relevance demonstrates the legitimacy of tools.

Tool Examples

To get a better understanding of the definition of tools, here are two examples: in the acquisition phase, the consultant needs to get a macro-level picture of the client. A suitable tool is the stakeholder analysis. In this tool, the stakeholders of the firm are categorized according to their influential power and interests in the activities. Moving into the analysis phase, tools are needed to break down complicated coherences. A simple, yet powerful tool is the problem tree. The original problem is stated as the "trunk" of the tree. In a next step, the "root causes" are searched for and placed at the bottom. Finally, the "branches" are representing the effects and consequences. This tool can help to switch the perspective and reach better results by aiming at root causes instead of curing symptoms.

Stakeholder Analysis Tool

Problem Tree Tool

So, how can you contribute? This study will be enriched by your experiences, opinions, skeptical thoughts, advices.

In case of open questions, please feel free to contact me anytime.

Literature Sources (for extended list see final paper)

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Figure 4 Code System

CODE SYSTEM

- Definition Consulting Success
 - Scope, Costs and Timing
 - Overall Satisfaction Client
 - Switch in way of working
 - Long-term improvement
- Activity related factors
 - Project Type
 - Adjustment of tools
 - Topic
 - Workshop tools
 - Project Phases
 - Phases
 - understanding the problem
 - Data collection
 - solution finding
 - decision making/comparing options
 - No clear structure
 - Intensity of Tools in Project Phases
- Client-characteristic related factors
 - No client-characteristic factors
 - Long-term adaptation
 - Tool expertise
 - hierarchy differences
 - Department differences
 - homogeneity of group
 - Easy-to-use tools
 - open-mindedness vs. reluctance/corporate culture
 - Expectations to use tools
- Consultant-background related factors
 - Personal asset-building
 - Toolkit composition
 - tools by combination with other consulting fields
 - most familiar
 - amount of tools
 - certain Tools stay valid over time
 - continuous development
 - Practical experience
 - difference small and large consultancy
 - failure
 - learning from/with colleagues
 - Educational background and training
- Industry related factors

Remote Work

New challenges

- More preparation of tools needed
- Negative effect creative processes
- adapt tools to get full potential
- new forms of workshops

No changes due to remote work

Virtual tools virtual context

Purpose of Tools

Structure

Efficiency

Universal acceptance

Signaling competence

Signaling safety

Visualization

Repeatability

Communication-enhancement

Complexity Reduction

Transparency

Reference building

Consolidation of information

Argumentation, Proof

Knowledge Transfer

Limits of Tools

Artificially increasing problems

Risk of limiting thoughts

Info too complex to put in tool

Individual solutions needed

Interpersonal factors/ Communication

functional knowledge

Why consulting?

Transfer of tools to the applied case