



# The active client: The boundary-spanning roles of internal consultants as gatekeepers, brokers and partners of their external counterparts

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## Abstract

This article examines the active client of management consultancy as a key agent in managing and mediating knowledge flows across organizational boundaries. From a qualitative study of a particular case of active clients—internal consultants managing their external counterparts—three boundary-spanning roles are identified. Active clients can act as a gatekeeper, broker and partner with respect to both consultants and the knowledge they bring. These roles are shown to vary according to a client's expertise, formal project responsibilities and personal reputation, as well as the different phases of consulting projects. They not only elucidate an otherwise neglected or static dimension of management consultancy—client activity—but highlight the dynamic and essentially political character of serving as knowledge barriers and/or bridges in the intermediation and co-production of management knowledge across organizational boundaries.

## Keywords

active client, boundary spanning, internal consultant, knowledge co-production, process, power

## Introduction

A range of actors, both internal and external to the organization, are involved in the flow of management ideas and practices (Perkmann and Spicer, 2008). In many contexts, external management consultants play a key mediating role and have received considerable academic attention (e.g. Hicks et al., 2009). This focus was often at the expense of their clients, who were portrayed as

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simple purchasers or passive recipients of consulting expertise (Werr and Styhre, 2003). Recently however, empirical attention to client-consultant interactions and a theoretical recognition of the processual nature of knowledge has led to more active conceptions of the client (Sturdy et al., 2009). As Höner and Mohe (2009: 299) reported, 'the formerly prevalent portrait of clients as victims, marionettes or passive consumers of consulting has been extensively revised'. Indeed, numerous images of the client are now evident. They can be sceptical purchasers of business services (Macdonald, 2006), or partners with consultants in the co-production of management knowledge (Clegg et al., 2004; Fosstenløkken et al., 2003). Likewise, theoretical perspectives have emerged pointing to the client's contingent, dynamic and socially produced form (Alvesson et al., 2009). And yet, despite criticism of the idea of a simply passive client, the concept of the active client remains underdeveloped. Most views are generic—active *or* passive—and static. They also typically fail to incorporate the full range of client practices, including choosing *not* to use particular consultants, evaluating consultant performance, and engaging with knowledge and learning.

Given the often wide use of external consultancy to import and legitimate new management knowledge, the concept of the active consultancy client has an importance well beyond the confines of consultancy. It can inform our understanding of how knowledge flows are managed across organizational boundaries. For example, while a significant and continuing literature exists on boundary-spanning roles and their contribution to the absorptive capacity of organizations (Aldrich and Herker, 1977; Jones, 2006; Tushman and Scanlan, 1981), few studies have extended such insights to the specific role of the client using external consultancy knowledge. Understanding how different forms of organizational boundary spanning occur within client-consultant interactions can also begin to address calls for more agential and process-oriented understandings of organizational learning and innovation (Easterby-Smith et al., 2008). Accordingly, this article aims to develop our understanding of the active consultancy client and its implications for management knowledge co-production.

Drawing on consultancy and professional services literature, we initially develop a framework for the 'active client'. This conceptually focuses first on the object of client activity, distinguishing between the *process* of managing consultants, and client activity as it relates to the *content*—the management ideas and practices they purvey. Second, the framework recognizes client activity directed towards often overlapping concerns of securing *organizational* ends on the one hand, and that based on personal *political* (identity and career) concerns on the other which have been neglected in studies of boundary spanning. Third, it incorporates variations in the forms of activity according to particular conditions, including the different broad dynamics of a consulting project.

Following a discussion of our research methods, the framework is then developed empirically by examining accounts of client-consultant boundary relations in a particular context—where internal consultants act as clients to external consultants. This somewhat unusual setting is apposite since internal consultants acting in this role can be seen to represent an extreme form of consultancy client which reveals issues of more general theoretical applicability to consulting client activity and boundary spanning. Internal consultants typically have expertise and a formal role in management innovation which is relatively rare within organizations (Birkinshaw et al., 2008). They also have expertise in consultancy itself. Both these factors bring a political client interest in external consultancy which is potentially greater than (but not substantially different from) that of more conventional clients. In particular, externals can pose a significant threat to the expert identity and status of internal consultants—what Carlile (2004) calls 'knowledge at stake'—but they also present possibilities for identification, or making boundaries more like bridges (Sturdy et al., 2009). On the basis of this ideal typical case, we aim to develop our understanding of the active consultancy client and boundary spanner more generally. In particular, three discernible images of

active client roles are identified reflecting varying levels of client-consultant competition and collaboration. We then argue that in addition to varying project conditions and dynamics, the personal reputation and organizational legitimacy of the client play a critical role in understanding management knowledge flow across boundaries.

## **Images of the active and passive management consultancy client**

Although multiple conceptions of the client have been evident in the literature for some time (e.g. Schein, 1969), a common view is that the portrayal of clients in consulting research has shifted from buyer to victim to partner (Werr and Styhre, 2003). Here, the traditional view of an active, if functional, role as purchasers of consulting expertise was challenged by a wave of ‘critical’ research which portrayed clients as passive victims of consultancy rhetoric (Clark, 1995). A reaction against this critique pointed to variations in client-consultant dependency relations and the possibility for more collaborative, partnership arrangements (Fincham, 1999). Our concern is not so much with the detail of this historical narrative, but with outlining and organizing various images of the consulting client in terms of being active and passive. Such an exercise, however, raises a number of problems.

First, the term ‘active’ has multiple meanings beyond a commonsense notion of being engaged in some kind of activity. Here, we use it to refer to seeking to assert control or affect the environment consciously, with deliberate action (Bohart and Tallman, 1996). Similarly, ‘passive’ does not imply an absence of action, but an acceptance of the environment, of others’ intentions, actions and their consequences. Thus, being active and passive are relative concepts. Furthermore, despite cultural value often being placed on action or pro-activity, neither being active or passive necessarily implies success or failure in achieving objectives (Hislop, 2002).

The second problem of classifying the active client is identifying what or who ‘the client’ is. This is not a new challenge. Schein (1997: 202), for example, described it as an ‘ambiguous and problematical’ process, rejecting a unitary view of the client being the organization. He favoured a more pluralist approach which we also adopt and develop. Here, distinctions are drawn between various clients, including the first contact for the consultant and primary owner of the problem, those intermediate individuals or groups directly involved in a project. In addition, our analysis extends Schein’s types to include the potential and former client, that is, those actors who engage with consultants in between formal projects and/or in relation to various forms of consultancy sales initiatives.

The third problem is two-fold and concerns the object and motives of client activity. This arises from a degree of variability in focus in the literature where emphasis can be given to exerting control over (i.e. actively managing) the consultants, and/or the ideas associated with consulting interventions—process and content respectively. For example, a client might actively seek out and select consultants for a project, but passively accept the management ideas involved without much criticism or adaptation (Hislop, 2002). Both areas of focus can be considered legitimate client domains, aimed towards organizational interests. However, research has drawn attention to parallel and sometimes conflicting client motives. Here, the use of external consultants and/or new ideas is directed at serving or defending the political and career interests of individuals and functional groups. Thus, both ideas and consultancy use can have symbolic value for individual clients (Armbrüster, 2006), but, as noted earlier, may also pose a threat to their expert identity. As Höner and Mohe (2009) point out for instance, clients may have an active interest in not systematically evaluating consultancy performance given the negative political exposure this may bring.

	Passive clients	Active clients
Control over consultants	A Victims of the sales pitch	C Purchaser and partner
Control over ideas	B Followers of fashion	D Co-producers

**Figure 1.** Images of the passive and active consultancy client

In Figure 1 we simplify and organize the various images and practices of the consulting client in the literature according to levels of activity and passivity, with regard to both consultants and management ideas. Overall, the analytical effect is to create four broad images of the active and passive client which we examine below. Then, by drawing on a wider literature, we explore some of the conditions, dynamics and potential consequences of client activity.

### *Passive clients*

The first of the two images of the passive client (low assertion of control over consultants—quadrant A) is quite common in the critical literature. Here, the client is seen as highly dependent; lacking in knowledge or experience of consultancy use; doing little to manage or evaluate consultants; and being vulnerable to their sales techniques and political manoeuvring (Ernst and Kieser, 2002). Indeed, such a client is also evident in prescriptive accounts—the client as ‘patient’ for example—emphasizing the need for the client to be more active or ‘intelligent’ (Czerniawska, 2002). Furthermore, the passive client is implied in the many accounts of active consultants—doing things to clients as technical experts, rhetoricians and catalysts for example (Blake and Mouton, 1983). This also applies to the second image of the passive client, with respect to management ideas (quadrant B). Here, the critical consulting literature, with its broader concern with management knowledge, emphasizes the uncritical adoption of management ideas and models by clients (Huczynski, 1993; Kieser, 2002).

### *Active clients*

The active user of management consultants (quadrant C) involves client images as purchasers and partners acting at the organizational boundary (Karantinou and Hogg, 2009). The purchaser deploys resource power and project management skills to be controlling and systematic and even sceptical in the selection, management and evaluation of consultants (Deelmann and Mohe, 2006). Such views of the active client are reinforced by the few available images of consultants as subordinate, outsourced ‘grey’ labour (Alvesson and Johansson, 2002; Höner and Mohe, 2009). At the same time and as already noted, clients can also be active in the sense of using the signalling function of consultants for their own or organizational ends (Armbrüster, 2006). Similarly, potential and intermediate clients may actively resist the use of consultants because of the personal, occupational or organizational threat they pose, or on the basis of consultants’ outsider status (Sturdy, 1997). Such competitive positions are countered by the other dominant image of the active user of consultants—as a partner or trusted colleague. Here, emphasis is placed on establishing and maintaining shared

objectives through negotiation and dialogue where parties co-habit a liminal space in between organizational boundaries as part of the same project team (Czarniawska and Mazza, 2003).

The partner image has a direct parallel with that of the final category—the active client with respect to management ideas or co-producer of knowledge (quadrant D). Indeed, it is difficult to distinguish between this idea and the notion of joint dialogue above, especially if one adopts a processual view of knowledge (Hicks et al., 2009). However, here the focus is more on the management ideas involved than the nature of the relationship. For example, there are variations in emphasis within this category between developing and adapting ideas into new knowledge—exploration, and clients actively seeking an off-the-shelf best practice—exploitation (Antal and Krebsbach-Gnath, 2001; cf. March, 1991). Finally, as already noted, clients can be active with respect to the symbolic, signalling and political role of management ideas for organizations, groups and individuals (Staw and Epstein, 2000). Likewise, potential and indirect clients may actively resist new ideas from the outside because of their foreignness or the threats they pose—boundaries as barriers (Kipping and Armbrüster, 2002)—although, as we shall see, internal consultants as clients can act as key mediators here.

### *Conditions and consequences of the active client*

Having organized and outlined some of the different ways in which consulting clients can be described as active or passive, we now briefly turn our attention to some of the conditions of such behaviour. In particular, given our focus, we are concerned with identifying when clients are more likely to be active. For instance, Lippitt and Lippitt (1986) distinguished between directive projects, where solutions are recommended or imposed by consultants on their clients as ‘patients’, and non-directive projects such as those involving process consulting. Similarly, Markham (1997: 72) outlines different conditions associated with client-centred projects:

- client wants independence; to learn; and to take decisions;
- consultant wants to prevent dependency and the client to grow;
- little empathy in the relationship; consultant not totally acceptable to client;
- high risk project or dynamic/long-term problem.

Implicit in these factors are the client’s ability/knowledge and power/dependency. Hence, we might expect to find the active management of consultants greater amongst clients with prior experience of consultancy (Sturdy and Wright, 2008), and in high risk and critical organizational changes (Abrahamson, 1996). Likewise, even highly dependent clients may pursue an active approach given sufficient levels of knowledge and individual self-confidence (Fincham, 1999). This might also be guided by formal training and governance mechanisms for the management of consultancy projects, or a culture of professional purchasing or project management (Werr and Perner, 2007).

Pointing to likely general conditions of client activity can be helpful, but in keeping with the study of innovation more generally, patterns need to be identified within their specific contexts (Tidd, 2001). Furthermore, this approach to the concept of activity remains rather static. For example, Nachum (1999) points out how it is not so much that dependency relations shape how active the client might be, but that active participation itself creates interdependency over time. More conventionally, a number of accounts in the business services field point to variations in the level of client activity between phases of an engagement (Mills and Morris, 1986). Similarly, one of the few studies of consultancy to focus on the active client identified variations over the course of the

consulting project (Hislop, 2002). For example, in one case, a client was active in selecting a consultant, but then chose to define the consultant as the dominant actor in the subsequent phases—active passivity.

Hislop's (2002) study is also unusual in suggesting specific outcomes from client activity. Hislop rightly eschews any assumption of inherent value to management ideas and focuses instead on how they are used and transformed. In particular, he found a close relationship between the level of client activity in managing consulting interventions and the extent to which consulting knowledge was customized. For example, high client involvement across the duration of the project resulted in the greatest degree of customization, whereas the case of active passivity led to the implementation of a generic solution and, in turn, greater rationalization of organizational processes to fit with the standardized system. Thus, the active managing of the *process* of consultancy can impact on the *content* of such interactions, that is, the production of management knowledge and associated organizational changes. However, it also shows how activity with regard to one stage of the consultancy process (consultant selection) is not necessarily associated with activity with respect to the adaptation of ideas.

This rare concern with the consequences of active client behaviour draws our attention to its wider significance, beyond simply a feature of client-consultant relations. Whether passive or active, clients are for the most part working at the organizational boundary in the identification, purchase, importation and/or legitimation of new or outside ideas and practices—what is often termed boundary spanning. While the concept of personnel acting as exchange agents between an organization and its environment is well established (Aldrich and Herker, 1977; Leifer and Delbecq, 1978; Tushman, 1977; Tushman and Scanlan, 1981), research has tended to focus on situations of formalized inter-organizational relations (e.g. supply-chain collaboration), or other specialist roles such as purchasing managers (Ellis and Ybema, 2010). For instance, Jones (2006) builds upon prior conceptions of an organization's absorptive capacity by highlighting how different managers acting as boundary spanners, gatekeepers and change agents translate and apply new knowledge from outside the organization and embed it within internal routines and practices. However, despite a growing recognition of the importance of organizational (and other) boundaries within studies of consultant-client relations (Kitay and Wright, 2004; Richter and Niewiem, 2009; Sturdy et al., 2009), the idea of consultancy clients as organizational boundary spanners has been largely neglected. We shall argue that managers as consultancy clients are engaged in a boundary-spanning activity which can be critical in the co-production of management knowledge and therefore, for organizational innovation.

## The study

Our study focuses on a specific form of consultancy client—specialist managers who formally have a role as internal consultants. Although they can assume different forms and use various titles, internal consultants are typically viewed as an alternative to external consultants, offering different qualities. The greater organizational grounding and lower cost of internals is set against the perceived independence, better access to new knowledge and greater 'symbolic capital' of externals (Armbrüster, 2006). At the same time, others have argued that their combination offers great potential for innovation (Scott and Hascall, 2006). What does seem clear, however, is that when internal consultants act in another, related role, as clients of externals, they are likely to be especially active. As specialist managers with an internal brief for assisting in the introduction of new practices, as well as experience in consultancy, internal consultants are unlikely to be wholly deferential or, by contrast, prejudiced against externals. Rather, the combination of their experience and formal role in organizational change, management ideas and consultancy, and the potential for career-enhancing

or -threatening relations with external consultants largely precludes passivity in relation to the use of externals. For these reasons, they are an ideal group to draw on in exploring the different dimensions of the active client.

This article is based on data from a larger research project investigating the activities, careers and identities of internal consultants. The project involved an inductive, qualitative research method to build grounded theory about those in internal consulting roles (Strauss and Corbin, 1998). Data collection comprised semi-structured interviews with a range of internal consultants in large Australian and global businesses during 2004–8. Respondents were recruited by targeting organizations identified in professional publications as using an internal consulting approach. Inquiries were sent to the senior human resource manager (HRM) in these firms, resulting in interviews with 32 internal consultants from 27 companies (see Table 1). A purposive sampling method was adopted, with interviewees selected on the basis of defining themselves as acting as internal consultants, or having an internal consulting role in their job titles or descriptions. These individuals were essentially specialist managers (mostly in the areas of HRM and organizational change) who assisted others in their organization through the provision of advice and expertise rather than direct authority (see Lacey, 1995). The interviews lasted between one and two hours and were recorded and fully transcribed. Questions included respondents' educational and career backgrounds, their position within the business structure, their role and activities, the nature of internal client relationships and broader organizational relations. In addition, we examined associated documentation, including organization charts, policy documents, and examples of respondents' change projects. To provide communicative validation, interview transcripts and related notes were provided to interviewees for corroboration, and follow-up interviews were undertaken with selected respondents.

**Table 1.** Interviewee respondents

Organization	Number of respondents
<b>Internal consultants</b>	
Accounting and consulting	3
Airline	1
Manufacturing	4
Industrial services	3
Insurance	3
Information technology	4
Banking	4
Retail	1
Telecommunications	1
University	2
Law firm	1
Resources	2
Local government	1
Consumer products	2
Total	32
<b>External consultants</b>	
Solo practitioner	7
Global management consultancy	2
Global HR consultancy	2
Small change consultancy	2
Small HR consultancy	2
Small strategy consultancy	1
Total	16

As part of this broader project, one of the key themes that emerged early on in our research was the varied forms of interaction between internal and external consultants. In seeking to develop this issue further we conducted a series of additional interviews with 16 external consultants who had regular interactions with internal consultants, including those we had interviewed previously (see Table 1). While there is always a need for caution in the treatment of interview data (Rubin and Rubin, 2005), especially where parties may be in direct competition or in highly dependent relations, the combined interviews provided considerable insight into the active client-consultant relationship and the strategies each used in working with (and/or against) each other.

In analysing our data, we initially read and coded the transcripts and associated documentation using the qualitative data analysis software *QSR NVivo*. This provided for an iterative process of data coding, hypothesis development, analysis and recoding (Crowley et al., 2002). Following an initial open coding process, we then identified key themes or higher level categories within which to organize our coding concepts. For example, in terms of the higher order category of the work activities of internal consultants, a subsidiary coding concept involved the interaction of internal consultants with their external counterparts. This in turn included coding for the reasons why internals and their organizations used external consultants; how external consultants were managed; different characterizations of the relationship; and the varying attitudes of internal and external consultants to these forms of interaction. Our coded data here revealed varying forms of interaction, including instances where the internal consultant sought to control the entry of external consultants in a defensive or competitive mode, as well as examples of more cooperative relations. In a third stage of selective coding of this issue, we developed the core category of the internal consultant as an organizational boundary spanner, acting as both a barrier and a bridge for knowledge exchange between the organization and its broader external context. Through reviewing and validating our coding of the data, we developed three principal images of the internal consultant as a client and organizational boundary spanner, which we termed gatekeeper, broker and partner. These images related not so much to fixed positions adopted by individuals, but rather to points on a continuum from competition to collaboration that could overlap or alternate within a project or client-consultant relationship. Our analysis suggests each of these images reflects different dimensions of client and boundary-spanning activity. In the following sections we outline these images, before discussing their broader implications.

### **Barbarians at the gates: controlling the entry of competitors across the organizational boundary**

Echoing much of the literature on internal consultancy, a pervasive theme that emerged from our interviewees was that of competition and control. Many emphasized their efforts to control the selection, entry and use of external consultants, acting essentially in the role of organizational boundary gatekeeper (see also Mohe, 2005) or primary clients. Hence, Peter, an internal consultant based in a large accounting firm, spoke about the constant cold-calls from external consultants and his role in deciding who would be allowed to pitch for work:

At least three or four external consultants contact me each week and I would probably maybe talk to one of them. I mean the other three they ring on the phone, I just say 'sorry, not interested'.

These respondents stressed an active role as savvy consumers of consultancy services with considerable discretion, carefully investigating applicants' skills and references. Despite the overlapping occupational identity, several client interviewees also expressed scepticism too, highlighting their

ability to see beyond a convincing sales pitch and distinguish those with the required expertise. Hence Della, a senior internal consultant in a large industrial services company, emphasized her rational approach to selection:

I have limited time. I don't want to be sold at. I want to assess who is the organisation (consultancy firm) that's going to come closest to meeting my requirements, not who is the organisation that are best at selling their skills.

Indeed, several internal consultants questioned whether externals posed a competitive threat at all given their own strength in this gatekeeping role and their superior technical expertise. Hence, Sophie, from a global engineering firm, dismissed the potential for what she termed 'rogue buying' of external consultancy by colleagues without first gaining her approval. In this sense, she played a role similar to that of central purchasing departments in client firms who control and sometimes frustrate both external consultants and those in other client roles (Werr and Perner, 2007). Others stressed a demarcation between the strategic activities of the internal consultant (implying a superior knowledge claim), and the use of external consultants as extra resources or 'grey labour', engaged in more routine tasks.

In addition to accounts of controlling external consultants crossing the organizational boundary, internals sought to control those who were already elsewhere in their firm. In one case, the competitive threat posed by externals was quite explicit:

So when the external tries to become intimate with *my* managers and starts cutting me out of the game, I have got a problem with that. So I sit them back on their backsides, I will phone them and I will berate them for what they have done... 'You are eating into my game. I want to know what you are doing with *my* managers' ...if they break that agreement too many times I will isolate them and move them out (original emphasis).

Other internals practised more subtle forms of gatekeeping by undermining external consultants' relationships with managers. As Joan, an experienced external consultant noted of internals:

often the tougher thing is the passive resistance from ... (an internal) who is not fully on board, and who's saying different things to different people. That sort of stuff undermines the trust of the senior people in the organisation, and that's much harder to re-establish.

However, not all internal consultants had the same capability. For example, as Angela, an internal OD consultant in a large resource company confided:

there is no mandate that says, if you want facilitation, you have to go through OD (internal consultants) to get it. You can pick up a phone and call your mate ...(an external). We're none the wiser.

To be a successful gatekeeper relied to a significant extent on the internal consultant's personal reputation and legitimacy as an internal expert. As Daniel noted, he could sometimes use his subject expertise to prevent senior managers from hiring externals:

I'm quite confident to say to the MDs [managing directors] in my business that I don't agree with that. Quite often that's the point at which they'll start to doubt themselves, so if I can get that seed of doubt in there, then I can often stop it.

Overall, the image of internal consultant as gatekeeper reflects the active client as a selective boundary spanner, controlling the selection and entry stages of the consulting process by way of quality control and/or protecting self-interest. This is much like practices reported elsewhere of conventional clients who are savvy, sceptical or sophisticated consumers (e.g. Macdonald, 2006) and those potential clients who resist consultancy usage (e.g. Sturdy, 1997). However, the data also revealed more subtle approaches, little discussed in the literature, including hidden resistance and efforts to raise their own organizational status and reputation as credible alternatives to using external consultants based on both their technical expertise and the relevance of their organizational knowledge. Such competitive approaches, however, represented only part of these clients' relationships with external consultants, one directed towards constructing the organizational boundary largely as a barrier rather than a bridge.

### **Intermediaries and interpreters: brokering external expertise**

The second theme emphasized by respondents was their client role as intermediaries between internal colleagues and external consultants; an imagery we have characterized as that of broker and one which connects directly with conventional notions of organizational boundary spanning. Here, the internal consultant was able to scan the firm's environment and identify and oversee the adoption of external knowledge (Tushman, 1977). Moreover, this role hinged upon their social capital and professional networks which allowed them to source new or relevant expertise (Burt, 1997). For example, interviewees spoke at length about the importance of their external networks of friends and colleagues in other organizations. In addition to keeping abreast of the latest management ideas, this external networking allowed internal consultants to share their experiences of external consultants and consulting firms, assisting their gatekeeping role. Once again, this parallels the practices of the more active of conventional clients who seek out information on external consultants through informal channels to assess the all-important 'networked reputation' of external providers (Glückler and Armbrüster, 2003).

The clients' brokering role also involved what was effectively outsourcing of their own services when they lacked the time, resources or desire to undertake tasks themselves. Indeed, this was also seen by some respondents as a useful strategic response to the competitive threat posed by external consultants. In these situations, respondents saw themselves as intermediate clients intervening within established consultant-client boundary relations and becoming the contact client with the external consultant (Schein, 1997). For instance, Peter spoke about how offering himself as a broker of the consultant-client relationship proved an effective form of intervention where senior partners in his accounting practice had a track record of by-passing him:

so a tactic that I've taken on is that there is one division I know who were using an external consultant. So I heard about it and went along to the business head and said... 'Alright, well I'll tell you what we'll do, we'll take over the management of that (project)...', and he was just delighted to actually give that away. So now it is advertised as a 'Learning and Education' (internal) product and we manage the external provider.

Such examples reflected more than carrying out the role of conventional purchasing departments as the internal client often co-branded with the external in providing the service, thus rendering the traditional organizational boundary quite diffuse. Indeed, unlike the gatekeeper role which focused on the entry stage of the consulting process, acting as a broker potentially extended the client's involvement to the diagnosis and implementation stages of the consulting project. However, obscuring boundaries through co-branding carried with it additional reputational risks.

Indeed, some interviewees spoke about how they laid out strict governance mechanisms for the behaviour of external consultants in their interactions with other client managers. Such a discourse was often linked to the evaluation of consultant performance in terms of value for money and knowledge transfer. The reputational risk of using external consultants is vivid in the case of internals and co-branding, but once again, also often applies to more conventional clients and acts as a source of their active management of consultants—the protection of personal reputation when using outsiders.

The image of the internal consultant as broker extended beyond the role of a structural intermediary to that of interpreter across cultural boundaries for both external consultants and internal colleagues. For example, several respondents emphasized the need to carefully brief and closely monitor external consultants in their interactions with other internal employees to ensure consistency with their organization's activities. From an external consultant's perspective, Dimity spoke of how her expertise in business process reengineering relied upon the internal consultant acting as a translator of the client organization's norms and customs; 'in terms of the culture I was blind and he (the internal consultant) was my guide'. This conforms to the established view of the value of internal consultants more generally—their organizational knowledge—but once again, it also echoes the few available accounts of those conventional clients who work closely with external consultants in the liminal space of project teams, such as the client project manager (Sturdy et al., 2009). Here, clients act as a cultural and political bridge, actively mediating between the external consultants and organizational peers. This boundary spanning is achieved by becoming partially removed from their regular operational worlds and identifying with the project tasks and even the consultants. Indeed, such identification was especially evident in another aspect of the brokering role of the internal consultants—translating the realities of external consultancy to internal managers. Hence, Keith, an internal consultant in a food company, spoke about how he had sometimes had to chastise his colleagues for their treatment of external consultants. Similarly Faye, an HR internal consultant in an insurance company, noted how she had to engage in damage control and stand up for the external provider when things had gone wrong.

The image of the internal consultant as a broker then, conforms much more closely to classic boundary-spanning roles than that of gatekeeper. However, it also highlights their complex identity as not only members of their organizations, but also specialists with access to external knowledge and expertise and a shared occupational identity as consultants (Wright, 2009). Sourcing and managing external consultants for their internal colleagues could prove valuable in building their reputation as 'cosmopolitans' and in filling resource gaps. But it also carried risks for the internal consultant's legitimacy, particularly when services were co-branded. Finally, internal consultants acted as cultural and political boundary spanners or translators between external consultants and management peers in order to overcome misconceptions and conflicts and crucially smooth the flow of externally sourced management ideas and practices.

### **Collaboration and co-production: social ties and partnership**

While the imagery of gatekeeper and broker stressed the competitive or, at least, overtly controlling aspects of the relationship between active clients and external consultants, the third group of images that emerged from our data highlighted more cooperation. What we have termed partnering referred, not to formal partnership contracts, but to instances where internal and external consultants worked closely together. For internal consultants as clients, this was a potentially significant means of learning and professional development and, as noted above, ensuring external providers

understood the internal culture and political landscape of their organization. Moreover, unlike brokering imagery, the internal consultant was able to emphasize a greater front stage role with fellow client managers.

Internal consultants' use of the imagery of partnership highlighted varying levels of engagement. For some, a controlling influence on the relationship persisted, but others saw external consulting partners more as peers and colleagues in the design and implementation of organizational innovations. For Daniel, this involved issues of trust and knowledge sharing:

So I think of them (externals) being part of my extended team ... It is a true deeper relationship and that means total transparency. I share all information with them. Organisational information, we share on an emotional level and a psychological level, so they know how I feel about things in the organisation. I might tell them about things that I don't agree with. So it is at that level.

The co-production of management knowledge was also stressed. As was the case in the broker role, at a basic level this involved characterizations by internals of the blending of their detailed knowledge of the organizational context with the consultant's external expertise or methodologies, resulting in a more customized organizational solution. At a deeper level, however, both parties provided examples of a more open process of collaborative exploration where the boundary distinctions between internal and external knowledge blurred. Here, in keeping with the more positive images of joint consultant-client project work, interactions were presented as a meeting of minds in which internal and external consultant brainstormed and bounced ideas off one another. Hence, Sam, the director of a boutique external strategy consultancy, talked about how after half a day working with the internal consultants in a client company: 'I'm not sure whose idea is on the whiteboard anymore'. Similarly, from an internal consultant's perspective, Teresa spoke about how her partnering with a trusted external consultant often involved egging each other on and taking risks in pushing the limits of what might work in presentations to senior internal managers.

Examples of such knowledge partnerships between insiders and outsiders were characterized as developing over time, within and often beyond a single consulting project. Accounts were also rich in the imagery of reciprocity, trust and strong interpersonal ties—social embeddedness (Das and Teng, 1998). For instance, externals spoke about how they would go 'the extra mile' and never abuse confidences. Similarly, internal consultants spoke about standing by their external counterparts even in situations where things had gone badly and internal colleagues were unhappy. In particular, the image of 'true partnership' was raised by several respondents as implying a sufficient level of trust for one party to challenge and confront the other without harming the underlying relationship (Nooteboom et al., 2007). For externals this was often represented as being frank and fearless in breaking bad news or holding up the mirror to their internal consultant counterparts although, as Daniel pointed out, this had its limits:

There are times when Charlie (external consultant) is the chap with the leadership role, and you try and push something and he says 'shut up, you are just carrying on like a dill, I've got to tell you this is what's happening'. And he'll be right and I'll have to listen...So there will be times when he's in the power seat and I'm going to comply with what he's advising me to do. And then there will be times when I will say, 'hang on Charlie, don't forget who is signing the cheque here son!' So it does move back and forward.

The imagery of internal and external consultants as partners therefore highlighted a far more symbiotic relationship than was the case in brokering roles or more conventional boundary spanning. Clearly however, the discourse of partnership also provided an ideological justification for

internal consultants in terms of their status and knowledge claims. Partnership implied security in both their role as organizational representatives and skilled professionals who were willing to share their knowledge and were open to learning with their trusted external colleagues. As noted above, however, such relations were dynamic, involving tensions and the potential for a return to more competitive interaction and boundary-spanning roles.

## Discussion and conclusion

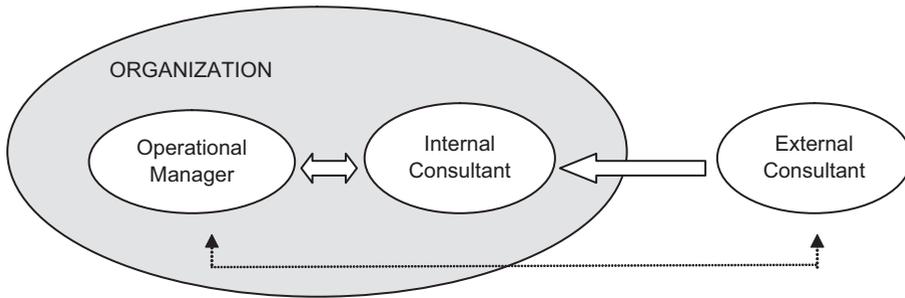
We have argued that internal consultants—in their dealings with externals—represent a particularly active form of consultancy client, a phenomenon much talked about in the consultancy literature, but not explored systematically. However, our focus has broader implications for the study of knowledge flow and boundary spanning in particular. For instance, our study reveals different dimensions, roles and dynamics of the active client which incorporate the process and content of the client-consultant relationship, both of which inform how management knowledge is co-produced.

A key finding from our analysis was the different active roles our consultant-clients played in spanning the organizational boundary (see Figure 2). These partly overlap with the conventional and largely static understandings of both the active client and boundary spanner (Aldrich and Herker, 1977; Mohe, 2005). However, they are by no means fixed. Indeed, in keeping with the dynamic nature of consultancy relationships and the idea that client activity can vary in its form and intensity, we have focused on the role of the client over time, both within and between formal projects. Clearly, a host of factors might influence which role is taken. For example, given its typically project-based form, one approximation of the dynamics of consultancy is its classic project stages (search and selection; diagnosis and planning; implementation and evaluation and beyond) (Lippitt and Lippitt, 1986). Each of these can be linked to our principal images of internal consultants as active clients.

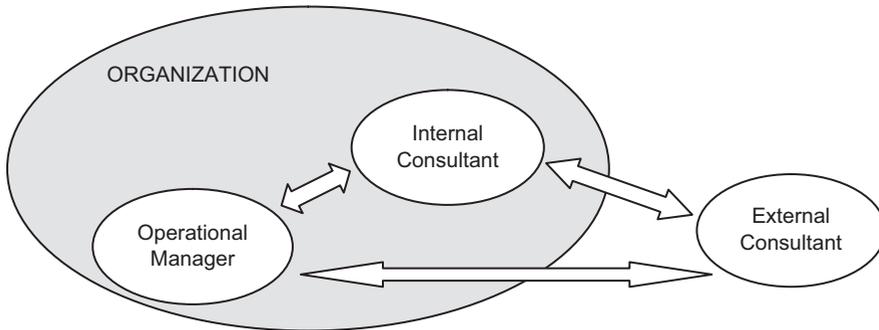
As a gatekeeper, the internal consultant focused primarily on controlling the entry of external consultants across the organization boundary, through the filtering of cold-calls and active involvement in search and selection. Where externals had by-passed the internal consultant, gatekeeping strategies sought to undermine the externals' legitimacy and other client relationships. Brokering imagery focused on the more conventional boundary spanner and contact client roles in the early stages of the consulting process, but extended to diagnosis, design and, potentially, implementation, particularly where interventions were co-branded. In such situations, the imagery of the client included acting as an interpreter of internal culture and politics, as well as supporting externals when things had gone wrong. Finally, the role of partner highlighted further variations in the forms of client activity and boundary spanning, particularly through the active involvement of both external and internal consultants in the design and implementation of organizational innovations, as well as their evaluation and the development of an on-going, post-project relationship of interaction. Here, client activity extended across the full scope of the consulting process and sometimes involved a much deeper level of engagement.

Largely implicit in the above relationship dynamics are different roles in the selection, use, adaptation and co-production of management knowledge (see Figure 3). Indeed, it is sometimes difficult empirically to separate the two objects of client activity we identified earlier—process and content. Nevertheless, we can draw out some implications of client activity for the ways in which management knowledge was produced and consumed, specifically the inter-relation between local and foreign knowledge within consulting projects. In particular, our research builds on the insights of Hislop (2002) who pointed to some of the ways in which client activity affects the customization

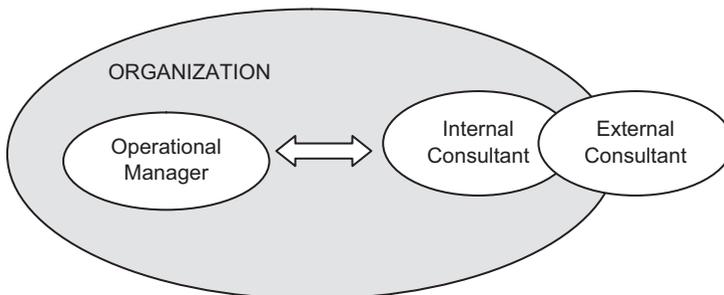
- (a) **Gatekeeper:** Internal consultant decides which external consultants work within the organization and acts as a 'contact' or 'primary' client, exercising quality control. Imagery of competition, control and organizational boundary as barrier.



- (b) **Broker:** Internal consultant becomes the 'contact' client, sourcing, managing and protecting the external provider as well as an interpreter of local knowledge. Internal scans the environment for consultancy expertise via professional and social networks. Imagery of bridging organizational boundaries.



- (c) **Partner:** Internal consultant acts as a 'contact' client but also collaborates directly with the external consultant in knowledge production/exploration. Imagery of partnership and trust which obscures organizational boundaries.



**Figure 2.** The boundary-spanning roles of the internal consultant as client

of management ideas as they flow across organizational and related boundaries. Our research suggests that the three client roles of gatekeeper, broker and partner were broadly associated with different forms of knowledge production and consumption.

Boundary-spanning role	Search and selection	Diagnosis, planning and implementation	Completion and evaluation
<b>Gatekeeper</b>	Active in determining the engagement and entry of external consultants—'quality control'.	Limited role	Limited role
<b>Broker</b>	Active in the search and selection of external consultants.  Acts as knowledge boundary spanner.	Co-branding with external. Co-production confined to design and oversight of project management; limited front-stage role.  Acts as cultural intermediary, customization/exploitation of external consulting knowledge for organizational context.	Active in contractual evaluation of external consultant.
<b>Partner</b>	Active in search and selection (shaped by existing relationships).	Full engagement in design and delivery of consulting project—co-production of intervention as both client and consultant.  Knowledge exchange and exploration between internal and external consultants.	On-going relationship with external. Evaluation based on trust and strong social ties.

**Figure 3.** Client roles and knowledge production across consultancy process

In the gate keeper role, internal consultants sought to maintain their control, and even monopoly, over the provision of management expertise within their organizations, often viewing external consultants as a competitive threat to their role and status. In some cases, their efforts appeared to be based on the personal political threat of externals as much as any concern for organizational interests such as quality control. Accessing external knowledge was pursued largely on the internals' own terms with limited internal adaptation evident, at least initially. A similar pattern of the exploitation of management knowledge was evident in the broker role, although in these cases, the externals played a greater part in the delivery of advice and services. Furthermore, in the co-branding of interventions with internal consultant clients, a greater degree of co-production was evident, particularly through the explicit customization and translation of generic methods for the local organizational context. However, it was the partner role which illustrated the greatest potential for the co-production of new knowledge or exploration. This was highlighted in the high level of engagement of both internal and external consultants in the design and implementation of consulting interventions. In some of the examples provided, the much deeper level of knowledge sharing and trust between the parties was presented as innovative work. Importantly, the role of the internal consultant client as a partner to the external consultant also held the promise of a relationship extending beyond the confines of a single project. In keeping with much of the literature on knowledge flow (e.g. Nooteboom et al., 2007), the socially embedded nature of this relationship appeared to offer greater potential for the interplay of local and foreign management knowledge.

In addition to providing insights into client-consultant dynamics and knowledge co-production, our findings build on established insights regarding organizational boundary spanning (Aldrich and Herker, 1977; Tushman, 1977). For instance, the concepts of organizational gatekeeper and boundary spanner have been used previously to highlight the role of managerial agency in the absorptive capacity of organizations (Cohen and Levinthal, 1990). More recently, Jones (2006) has also stressed the importance of organizational change agents in adapting and translating external knowledge to organizational routines. However, variations in the level of activity and passivity in these roles have been largely neglected, including in the increasingly common context of the client-consultant relationship. The internal consultant as active consultancy client epitomizes the classic view of the boundary spanner as an exchange agent between the organization and its environment. As we have shown, internal consultants undertake multiple boundary-spanning roles across, and sometimes within, different consultancy projects. Here, the active consultancy client is engaged not only in the transfer and translation of outside knowledge, but also in political and cultural negotiation with both their external counterparts and internal organizational stakeholders. However, as we have shown, this can be a problematic role for those lacking organizational legitimacy and the political skill to circumvent alternative forms of outside knowledge acquisition.

Indeed, our analysis supports those who have argued for a consideration of the role of power in understanding how organizations absorb new knowledge across their boundaries (e.g. Easterby-Smith et al., 2008). In taking on the role of the active consultancy client, whether as gatekeepers, brokers or partners, internal consultants engaged in a form of political manoeuvring which sought to emphasize their status as internal experts. However, such a status was by no means assured and often contested—knowledge was ‘at stake’ (Carlile, 2004). In particular, challenging a senior manager’s decision to use external consultants was a critical test of the internal consultant’s wider legitimacy. Those who did so most successfully emphasized their personal reputation as internal (functional) experts within their organizations as well as their boundary-spanning role as a source of social capital (Burt, 1997). Such a depiction was often supported by external consultants who presented their internal consulting partners as individuals with significant organizational influence. Hence, like external consultants who rely upon a form of ‘networked reputation’ in their interactions with corporate clients (Glückler and Armbrüster, 2003), so internal consultants are also engaged in reputation building within their organizations (Pettigrew, 1975). Indeed, our data suggests that it is their legitimacy or credibility as internal experts combined with their boundary-spanning networks and relationships that allows these consultant-clients to engage in collaboration (brokering and partnering), power sharing and risk taking with externals, and confront challenges if interventions go awry. More generally then, the case of internal consultants highlights an otherwise neglected feature of client activity—the importance of internal reputation both in supporting the non-use of consultancy (as a potential client) and facilitating their use. The latter derives both from the value attached by externals to clients with influence and expertise, and from the client’s role in supporting the introduction of outside actors and ideas into their organization—the client as knowledge intermediary across the organizational boundary (cf. Howells, 2006).

Studying internal consultants acting as consulting clients reveals a number of dimensions, conditions and outcomes which might not have been as evident from researching clients in general. However, this approach does have limitations and suggests areas where further investigation is required. First, our focus on internal consultants combined with use of interviews as the main research method meant that some features of client activity and passivity were not well represented. For example, respondents provided few examples of themselves as passive and dependent clients or of being active in pursuing their own personal political ends. Although we would not

expect internal consultants to highlight a passive self-image, the potential for passivity exists, especially in relation to the use of ideas or, perhaps, from over-identification with external consultants. Second, the detail of knowledge production and consumption in internal-external consultant relationships needs to be further developed. For instance, we were not able to assess fully the broader organizational implications of the different forms of boundary spanning and knowledge sharing. However, the use of different methods, such as longitudinal case studies of such relationships might better chart how specific ideas and practices enter and are adapted within organizations over time, and to what extent the roles we have identified enhance or constrain knowledge sharing more broadly (Hicks et al., 2009). Third, while our study has drawn attention to some of the processes involved in the rejection of external management consultancy, the whole issue of the active non-use of management consultancy and alternative ways of organizing management innovation which constructs barriers, as much as spans them, is under-researched despite its obvious policy implications.

A perennial theme in the study of organizational innovation and management learning is how and why organizations and individuals engage with new ideas and practices from outside their existing contexts of experience. In an era in which innovation is promoted as almost a moral imperative, we are likely to witness increased organizational engagement with external knowledge and those who have access to it. We have shown in this article how such a process can take a range of forms according to various conditions and functional and political dynamics and choices, each with different potential outcomes for the co-production of management knowledge. Given the widespread use of management consultants, the role of the active consultancy client as organizational boundary spanner therefore provides additional empirical and conceptual insight into the broader process of management learning.

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