

## An Analysis of Consultancy Firm and Client's Relationship: Basis for Strategic Plan

Erwei Cui<sup>1\*</sup>, Ma. Germina Santos<sup>2</sup>

<sup>1</sup> *Chief Consultant, Beijing, China*

<sup>2</sup> *Faculty, Nueva Ecija University of Science and Technology*

[804506628@qq.com](mailto:804506628@qq.com)

**Abstract.** This study delves into the intricate relationships between consultancy firms and clients within China's dynamic consulting industry. By analyzing demographic profiles, collaboration dynamics, and recurring challenges, the study aims to provide valuable insights for strategic decision making, improved collaboration, and enhanced performance within the industry. The research leverages a theoretical framework built on Relationship Marketing, Consultancy–Client Relationship, and Resource Dependency theories. A descriptive research design employing quantitative methods was used. The analysis revealed a multifaceted industry landscape with a gender gap, a dominance of mid-career professionals, and a strong emphasis on advanced degrees and leadership positions. The examination of relationship strategies, including resourcing, control, and influence, demonstrated a positive perception from respondents. This suggests a commitment to client needs, effective project management, and relationship building. However, the study identified areas for improvement, highlighting the need for continuous adaptation to address evolving challenges and client expectations. Furthermore, the analysis of challenges encountered within consultancy engagements revealed multifaceted obstacles across resourcing, controlling, and influencing domains. While respondents generally perceived practices favorably, specific challenges in resource allocation, project control, and influencing strategies were acknowledged. To address these issues, the research proposes a strategic plan focusing on key areas for improvement within consultancy firms, such as resource optimization, project control, technology integration, client satisfaction, and ethical considerations. This structured approach offers a roadmap for navigating client relationships, fostering stronger collaborations, and achieving better outcomes within a competitive business environment.

*Keywords: Challenges, China, Consultancy, CCRT, Demographics, Relationship Marketing, Relationships, resources, Strategic Plan.*

## 1. Introduction

The Chinese consulting industry has witnessed remarkable growth, transforming into a multifaceted sector offering diverse services such as strategic, management, technical, and socio-economic consulting. This exponential growth, reaching approximately 500 billion yuan in 2019, reflects a significant compound annual growth rate of 24.5%. As China's economy evolves and social dynamics deepen, the consulting industry faces increased demands for customized services. Anticipated trends include service segmentation, specialization, digitalization, adoption of intelligent technologies, and the emergence of innovative consulting models.

This research is motivated by the complex and evolving nature of relationships between consultancy firms and their clients within the dynamic Chinese consulting industry. As the industry undergoes unprecedented growth and transformation, understanding the complexities inherent in these relationships becomes essential for consultants, firms, and policymakers alike. Demographic profiles, relationship dynamics, and challenges encountered in consultancy engagements represent critical aspects requiring systematic exploration to provide nuanced insights for strategic decision-making, effective collaboration, and the enhancement of performance and resilience among consultancy firms in China.

The consultancy landscape is characterized by complexity, with various demographic profiles intersecting with intricate relationship dynamics and inevitable collaboration challenges. Factors such as gender diversity, age variations, educational backgrounds, organizational cultures, and leadership hierarchies are interconnected, influencing strategies, problem-solving approaches, and communication styles within consultancy engagements.

## 2. Methodology

This study employed a quantitative research design, specifically utilizing a descriptive approach. This selection stemmed from the effectiveness of descriptive research in providing a clear portrayal of the current state of the phenomenon under investigation, which in this case, is the dynamics of consultancy firm and client relationships (Creswell, 2013).

### 2.1. Sampling Procedure

The target population for this study encompassed consultancy practitioners from diverse professional backgrounds. Considering the extensive nature of this population, a sample was drawn to ensure a manageable and representative subset for the research. A sample size of 385 was determined, adhering to standard practices in social science research and ensuring a 95% confidence level with a 5% margin of error.

A convenience sampling method was employed due to the challenges associated with implementing probability-based methods in this context. This method involved selecting participants readily accessible and willing to participate, ensuring a practical and feasible approach (Charan & Biswas, 2013).

$$n = \left( \frac{Z_{\alpha/2} \times \sigma}{E} \right)^2$$

Where:

(n) is the sample size

( $Z_{\alpha/2}$ ) is the Z-score corresponding to the desired confidence level (for 95% confidence level, ( $Z_{\alpha/2}$ ) is 1.96)

( $\sigma$ ) is the standard deviation (in this case, 0.5)

(E) is the margin of error (in this case, 5% or 0.05)

Plugging in the values, the equation becomes:

$$n = (0.05 \times 1.96 \times 0.5)^2$$

Calculating this yields:

$$n = (0.05 \times 0.98)^2$$

$$n = (19.6)^2$$

$$n = 384.16$$

## 2.2. Respondents

The study targeted consultancy practitioners from various industry sectors, including finance, technology, and management.

### 2.2.1 Research Site

Geographically, the majority of participants were based in Beijing, China, reflecting the researcher's location. However, online outreach efforts ensured representation from other regions within China.

### 3. Results and Discussion

#### 3.1. Demographic profile of the respondents

The table below presents the demographic profile of the respondents participating in the survey. The data offers insights into the gender distribution, age distribution, educational attainment, and their positions within these companies. Understanding the demographic characteristics of the respondents is crucial for contextualizing their perspectives and experiences within the consultancy industry, thereby facilitating a deeper analysis of the complexities within consultancy firms and clients' relationships.

Variables	Frequency	Percentage
<b>Gender</b>		
Male	226	58.70
Female	159	41.30
<b>Total</b>	<b>385</b>	<b>100.00%</b>
<b>Age</b>		
Under 25	6	1.6
25-34	53	13.8
35-44	235	61
45-54	86	22.3
55 and above	5	1.3
<b>Total</b>	<b>385</b>	<b>100.00%</b>
<b>Educational Attainment</b>		
High School or below	12	3.1
Some College/Trade School	24	6.2
Bachelor's Degree	102	26.5
Master's Degree	158	41.0
Doctorate/Ph.D.	89	23.1
<b>Total</b>	<b>385</b>	<b>100.0%</b>
<b>Position</b>		
Entry-level	18	4.7
Mid-level	129	33.5
Senior-level	90	23.4
Executive/Leadership	131	34.0
Others	17	4.4
<b>Total</b>	<b>385</b>	<b>100.00%</b>

The data shows male respondents (58.70%) outnumber females (41.30%), indicating a gender imbalance in consultancy leadership. Most respondents (61.0%) are 35–44 years old, with 41.0% having Master's degrees and 23.1% holding doctorates. Executive/leadership roles comprise 34.0% of respondents, highlighting the importance of understanding consultancy dynamics from various organizational levels. Gender equity, expertise, and specialization remain

crucial in the consultancy industry, with ongoing research essential to adapt to its evolving landscape.

### 3.2. *The consultancy firms and clients' relationship*

The table shows consultancy firm–client resource assessments, evaluating resource management strategies and their effectiveness in meeting client needs and project requirements. Indicators provide mean scores and verbal descriptions for a comprehensive overview.

Indicators	Mean	Verbal Description
1. Our consultancy firm adequately assesses the resource requirements before initiating a project.	3.33	Strongly Agree
2. Resources are allocated based on the specific needs and challenges of each client.	3.23	Agree
3. Our firm considers the scalability of resources to adapt to project expansions or contractions.	3.27	Strongly Agree
4. The firm has a process for optimizing resource utilization across various client engagements.	3.05	Agree
5. Client feedback is actively considered in adjusting resource allocation strategies.	3.23	Agree
6. The firm invests in ongoing training and development to enhance resource capabilities.	3.18	Agree
7. Our consultancy firm considers environmental sustainability in resource allocation decisions.	3.29	Strongly Agree
8. Resources are proactively reallocated in response to changing client priorities.	3.22	Agree
9. The firm has contingency plans in place to address unexpected resource challenges.	3.15	Agree
10. Regular evaluations are conducted to assess the effectiveness of resource allocation strategies.	3.21	Agree
<b>Grand Mean</b>	<b>3.22</b>	<b>Agree</b>

*Legend: 3.25-4.00 – Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree*

The average score of 3.22 in the "Agree" category demonstrates that respondents generally view consultancy firm resourcing practices and client relationships positively. This suggests that consultancy firms' resource strategies meet the needs and expectations of both parties. High ratings in indicators like adequate resource assessment, environmental sustainability, adaptability, and responsiveness show a focus on thorough assessment, ethics, and addressing evolving client needs. Although some indicators have slightly lower scores, they still fall within the "Agree" range, highlighting areas for improvement. Research supports these findings, emphasizing the importance of resource assessment, adaptability, and ongoing training.

**3.3. The consultancy firm and clients' relationship in terms of controlling**

The table evaluates consultancy–client relationships in terms of controlling, focusing on project control mechanisms like structured processes, communication, and adaptability. It provides mean scores and descriptions to understand controlling practices' effectiveness in consultancy engagements.

Indicators	Mean	Verbal Description
1. Our firm has established key performance indicators (KPIs) for project control.	3.13	Agree
2. There is a systematic process for identifying and mitigating risks in our client engagements.	3.26	Strongly Agree
3. Client expectations are clearly communicated and documented to ensure effective control.	3.22	Agree
4. The firm employs advanced technology tools for project monitoring and control.	3.12	Agree
5. Team members receive regular feedback on their performance in controlling project elements.	3.18	Agree
6. The firm adapts control mechanisms to the unique characteristics of each client.	3.12	Agree
7. The effectiveness of control measures is systematically reviewed after completing each project.	3.11	Agree
8. Our firm encourages collaboration and communication to enhance project control.	3.27	Strongly Agree
9. Changes in project scope are carefully assessed for their impact on control measures.	3.14	Agree
10. Control processes are aligned with industry best practices and standards.	3.15	Agree
<b>Grand Mean</b>	<b>3.17</b>	<b>Agree</b>

*Legend: 3.25-4.00 –Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree*

The average score of 3.17 in the "Agree" category suggests that respondents view consultancy firm control practices and client relationships favorably. This indicates that, on average, respondents find consultancy firms' control strategies satisfactory for project management and risk mitigation. High ratings in risk management and communication indicators show a focus on proactive strategies and adapting to client needs. However, some areas like reviewing control measures and utilizing advanced technology tools could be improved for continuous enhancement in project control effectiveness. Studies emphasize the importance of strong client relationships and tailored control mechanisms, aligning with the survey findings.

**3.4. The consultancy firm and clients' relationship in terms of influencing**

The table evaluates consultancy firm–client relationships, focusing on strategies used to impact client decisions. It measures tailored approaches, partnerships, and innovative thinking for better client outcomes. Mean scores and descriptions provide insights into the effectiveness of these practices.

Indicators	Mean	Verbal Description
1. Our consultancy firm tailors influencing strategies based on the specific client's organizational culture.	3.16	Agree
2. The firm provides continuous training on ethical influencing practices for client-facing teams.	3.32	Strongly Agree
3. Our consultants actively seek feedback from clients to improve their influencing techniques.	3.24	Agree
4. Strategic alliances and partnerships are formed to strengthen the firm's influencing capabilities.	3.22	Agree
5. Client testimonials and success stories are used to positively influence potential clients.	3.24	Agree
6. The firm fosters a culture that encourages innovative thinking in influencing client decisions.	3.22	Agree
7. Consultants are equipped with a diverse set of influencing skills to address varied client preferences.	3.36	Strongly Agree
8. Client satisfaction is considered a key indicator of the success of influencing strategies.	3.13	Agree
9. The firm adapts influencing strategies to changes in the client's competitive landscape.	3.14	Agree
10. Regular assessments are conducted to measure the effectiveness of different influencing approaches.	3.17	Agree
<b>Grand Mean</b>	<b>3.22</b>	<b>Agree</b>

Legend: 3.25-4.00 – Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree

The average "Agree" rating for influencing strategies in consultancy firm–client relationships indicates a positive perception. Highlights include continuous training and skill development, client feedback utilization, and success story sharing. However, there's room for improvement in emphasizing client satisfaction as a key success indicator and consistently aligning with client culture and competitive landscape changes. Recent research supports these findings, emphasizing the importance of continuous improvement in consultancy firms.

### 3.5. The challenges encountered in the consultancy firm and clients' relationship in terms of resourcing

The table evaluates consultancy firm–client challenges, particularly resourcing issues, affecting resource planning, allocation, and utilization. It highlights their

impact on project results and client satisfaction, with mean scores indicating challenge severity.

Indicators	Mean	Verbal Description
1. Our consultancy firm faces challenges related to accurately predicting resource requirements.	2.52	Agree
2. There are instances where resource allocation falls short of meeting client expectations.	2.43	Disagree
3. The firm encounters difficulties in balancing resource availability across multiple client projects.	2.50	Agree
4. Resourcing challenges sometimes lead to delays in project timelines.	2.50	Agree
5. Client satisfaction is impacted by occasional resource shortages in our firm.	2.48	Disagree
6. The firm experiences challenges in adapting resource plans to sudden client needs.	2.51	Agree
7. There are instances where communication gaps contribute to resourcing challenges.	2.50	Agree
8. Challenges related to resource procurement occasionally hinder project success.	2.47	Disagree
9. The firm faces difficulties in maintaining optimal resource utilization levels.	2.48	Disagree
10. Regular reviews are conducted to identify and address persistent resourcing challenges.	2.49	Disagree
<b>Grand Mean</b>	<b>2.49</b>	<b>Disagree</b>

*Legend: 3.25-4.00 – Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree*

The average score of 2.49 in the "Disagree" category indicates that respondents perceive resource challenges in consultancy firms and client relationships. This mixed perception shows areas where respondents may not fully agree on the severity of these challenges. However, specific concerns like predicting resource requirements, balancing availability, and adapting plans to sudden client needs have consensus among respondents. These findings emphasize the complexities in resource management within consultancy engagements due to dynamic client demands and the need for agile responses. Respondents agreed on the impact of resourcing challenges on project timelines and communication gaps contributing to these issues. Although some mean scores indicate disagreement, it shows measures in place to mitigate these challenges. Studies align with these findings, emphasizing continuous improvement in resourcing and talent planning. In conclusion, proactive planning, communication, and adaptive



strategies are crucial for overcoming resource challenges in consultancy firms and enhancing client satisfaction.

3.6. *The challenges encountered in the consultancy firm and clients' relationship in terms of controlling*

This table showcases consultancy firm and client control issues. It highlights challenges in managing projects and outcomes, providing mean scores and descriptions for better understanding of controlling difficulties within consultancy projects.

Indicators	Mean	Verbal Description
1. Our consultancy firm encounters challenges in accurately forecasting project risks.	2.45	Disagree
2. There are instances where control mechanisms fail to prevent deviations from project plans.	2.46	Disagree
3. The firm faces difficulties in aligning control measures with client expectations.	2.49	Disagree
4. Changes in project scope often lead to challenges in maintaining effective control.	2.45	Disagree
5. Control mechanisms sometimes struggle to adapt to the unique aspects of each client.	2.48	Disagree
6. Team members occasionally face challenges in implementing recommended control measures.	2.53	Agree
7. The firm experiences difficulties in proactively identifying potential risks in client engagements.	2.48	Disagree
8. Our firm encounters challenges in maintaining transparency in project control processes.	2.50	Agree
9. The effectiveness of control measures is sometimes compromised due to unforeseen circumstances.	2.47	Disagree
10. Periodic assessments are conducted to address persistent challenges in project control.	2.49	Disagree
<b>Grand Mean</b>	<b>2.48</b>	<b>Disagree</b>

*Legend: 3.25-4.00 –Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree*

The mean score of 2.48 in the "Disagree" category indicates that respondents generally perceive minimal controlling challenges in consultancy firm–client relationships. However, they agree on difficulties in implementing control measures (Mean = 2.53) and maintaining transparency (Mean = 2.50). Despite these challenges, they disagree that forecasting project risks and addressing persistent issues are significant problems. Studies align with these findings, emphasizing the need for continuous improvement in controlling consultancy engagements amidst dynamic environments.

### 3.7. *The challenges encountered in the consultancy firm and clients' relationship in terms of influencing*

This table evaluates consultancy firm–client influencing challenges, offering insights into obstacles in shaping client decisions and fostering positive relationships through effective techniques. Mean scores and descriptions show the perceived severity of these challenges in consultancy engagements.

<b>Indicators</b>	<b>Mean</b>	<b>Verbal Description</b>
1. The firm faces challenges in tailoring influencing strategies to diverse client organizational cultures.	2.50	Agree
2. There are instances where ethical considerations pose challenges in influencing client decisions.	2.49	Disagree
3. Consultants encounter difficulties in adapting influencing techniques to changing client preferences.	2.51	Agree
4. Challenges arise in building and maintaining strategic alliances to enhance influencing capabilities.	2.50	Agree
5. The firm occasionally faces resistance in influencing decisions due to client skepticism.	2.47	Disagree
6. Client testimonials and success stories sometimes have limited impact in positively influencing potential clients.	2.50	Agree
7. The firm encounters challenges in fostering a culture of innovation in influencing approaches.	2.46	Disagree
8. Consultants face difficulties in adapting influencing strategies to evolving client competitive landscapes.	2.50	Agree
9. Regular assessments are conducted to address challenges and refine influencing strategies.	2.49	Disagree
10. The firm experiences challenges in achieving alignment between influencing strategies and client satisfaction.	2.49	Disagree
<b>Grand Mean</b>	<b>2.49</b>	<b>Disagree</b>

*Legend: 3.25-4.00 – Strongly Agree; 2.5-3.24 – Agree; 1.75-2.49 – Disagree; -1.00-1.74 – Strongly Disagree*

The mean score of 2.49 in "Disagree" category indicates mixed perceptions among respondents on challenges faced in influencing strategies within consultancy firms and client relationships. This suggests that while there are obstacles in shaping client decisions and fostering positive relationships, not everyone agrees on their severity. Specific areas of challenge include adapting to diverse client cultures and changing preferences. However, some disagreement exists regarding challenges in addressing ethics and fostering innovation in influencing approaches. Research by Morrison–Smith and Ruiz (2020) supports these findings, highlighting the complexities in consultancy engagements.

### 3.8. The proposed strategic plan for consultancy firms

This study-based consultancy firm strategic plan is summarized below.

Focus Area	Objectives	Strategies	Key Activities	Timeline	Responsible Parties	Verifiable Indicators
<b>Resourcing</b>						
Optimizing Resource Utilization	To improve the efficiency and effectiveness of resource allocation within consultancy engagements, leading to better utilization of resources and improved project outcomes.	<ol style="list-style-type: none"> <li>1.Implement a resource allocation optimization strategy.</li> <li>2.Develop contingency plans for unexpected resource challenges.</li> <li>3.Enhance communication channels to mitigate gaps in resource planning and allocation.</li> </ol>	<ol style="list-style-type: none"> <li>1.Conduct a comprehensive assessment of current resource allocation practices and identify areas for improvement.</li> <li>2.Develop and implement a resource allocation optimization plan, including the establishment of criteria for resource allocation based on project requirements and consultant expertise.</li> <li>3.Create contingency plans to address potential resource shortages or unexpected demands, outlining procedures for reallocating resources as needed.</li> <li>4.Enhance communication channels between project managers, consultants, and resource managers to improve transparency and coordination in resource planning and allocation.</li> </ol>	Assessment and planning: 1 month Development and implementation of optimization plan: 3 months Enhancement of communication channels: Ongoing	Project management team: Oversees the assessment, planning, and implementation of resource optimization strategies. Resource management team: Collaborates with project managers to develop and implement resource allocation plans and contingency measures. Human resources/training department: Provides training on effective communication practices to improve coordination among stakeholders.	Resource utilization rates: Measure the percentage of allocated resources utilized effectively in consultancy projects. Project success rates: Track the percentage of projects completed on time and within budget. Client feedback: Assess client satisfaction with project outcomes and resource allocation processes. Number of instances of resource reallocation: Monitor the frequency and reasons for reallocating resources to address unexpected challenges or changing project requirements.
Contingency Planning	Enhance preparedness to respond effectively to unforeseen circumstances by developing robust contingency plans and mechanisms for resource reallocation. Facilitate alignment	<ol style="list-style-type: none"> <li>1.Develop comprehensive contingency plans outlining procedures for identifying, assessing, and mitigating unexpected resource challenges.</li> <li>2.Establish clear protocols for resource reallocation in response to</li> </ol>	<ol style="list-style-type: none"> <li>1.Conduct a thorough risk assessment to identify potential scenarios requiring contingency planning.</li> <li>2.Develop contingency plans tailored to different types of resource challenges, such as personnel shortages or equipment failures.</li> </ol>	Risk assessment and plan development: 3 months Staff training on contingency procedures and communication protocols: 1 month	Risk management team: Leads the risk assessment and development of contingency plans. Project management team: Implements communication enhancements and oversees staff training. Resource management team: Executes	Frequency and severity of unexpected resource challenges Timeliness and effectiveness of resource reallocation efforts Improvement in communication metrics, such as reduced instances of miscommunication or delays

	between resource planning and project execution through improved communication processes to reduce misunderstandings or delays.	emergent project needs or disruptions. 3.Implement communication enhancements to improve coordination between resource managers, project managers, and consultants.	3.Train staff on contingency procedures and communication protocols to ensure readiness to implement plans when needed. 4.Regularly review and update contingency plans based on lessons learned and changes in project requirements or external factors.	Implementation of communication enhancements: 2 months Ongoing review and updating of contingency plans: Quarterly	resource reallocation procedures as outlined in contingency plans. Quality assurance team: Conducts regular reviews and updates of contingency plans to ensure relevance and effectiveness.	Feedback from project teams on the clarity and usability of contingency plans Reduction in project disruptions or delays attributed to resource challenges
<b>Controlling</b>						
Regular Review of Control Measures	Implement structured processes for the periodic evaluation and adjustment of control measures to facilitate continuous improvement and enhance project control effectiveness. Address barriers to effective control implementation, such as resistance to change or inadequate training, to ensure the successful adoption and execution of recommended control measures.	1.Establish a standardized framework for the regular review of control measures, including defined intervals and criteria for evaluation. 2.Provide comprehensive training programs to ensure staff proficiency in implementing and adapting control measures to changing project requirements. 3.Foster a culture of continuous improvement by soliciting feedback from project teams and stakeholders and integrating lessons learned into control processes.	1.Develop a schedule for regular control measure reviews, specifying the frequency (e.g., quarterly, annually) and responsible parties for conducting evaluations. 2.Design training modules covering the fundamentals of control measures, best practices for implementation, and strategies for addressing common challenges. 3.Establish mechanisms for collecting feedback from project teams and stakeholders, such as surveys, focus groups, or project debriefings.	Development of standardized review framework: 2 months Implementation of training programs: 3 months Initiation of regular control measure reviews: 4 months (following training completion) Integration of feedback and adjustments to control processes: Ongoing	Control measure review committee: Oversees the development and implementation of the review framework and conducts periodic evaluations. Training department: Designs and delivers training programs on control measures to staff across all levels of the organization. Project managers: Collaborate with the control measure review committee to provide input and feedback based on project experiences.	Frequency and thoroughness of control measure reviews Participation rates and feedback from staff in training programs Number of control measure adjustments made based on review findings or stakeholder feedback Reduction in project incidents or deviations attributed to improved control measures Employee satisfaction and confidence levels in control measure implementation and effectiveness
Leveraging Technology for Project Monitoring and Control	Enhance project monitoring and control processes through the strategic integration of advanced technology tools.	1.Identify technology gaps and opportunities for improvement in current project monitoring and control processes. 2.Research and evaluate	1.Conduct a comprehensive assessment of existing project monitoring and control workflows, systems, and tools. 2.Engage with technology vendors and experts to explore available solutions and assess	Technology assessment and vendor engagement: 2 months Solution evaluation and selection: 1 month Pilot implement	Technology task force: Leads the assessment, selection, and implementation of technology solutions, comprising representatives from IT, project management, and	Reduction in project turnaround time and cycle times due to streamlined workflows and automation Increase in data accuracy and reliability as measured by error

	<p>Improve data accuracy, streamline workflows, and provide real-time insights to support informed decision-making. Enhance transparency in project control processes through improved documentation and communication practices facilitated by technology solutions.</p>	<p>innovative technology solutions tailored to the specific needs and objectives of the consultancy firm. 3.Implement selected technology solutions in phases, prioritizing areas with the greatest potential for efficiency gains and impact on project outcomes.</p>	<p>their compatibility with the firm's requirements. 3.Develop an implementation roadmap outlining the phased rollout of selected technology solutions, including timeline, resource allocation, and training plans.</p>	<p>ation of selected technology solutions: 3 months Full-scale implementation and integration: 6 months Ongoing monitoring and optimization: Continuous</p>	<p>relevant stakeholders. Project managers: Provide input on technology requirements and participate in pilot testing and training sessions. IT department: Supports the deployment, integration, and maintenance of technology solutions, ensuring alignment with organizational objectives and security standards.</p>	<p>rates and quality assurance metrics Adoption rates and user satisfaction with new technology tools and systems Improvement in project transparency and stakeholder trust as evidenced by feedback and survey results Cost savings and efficiency gains attributed to technology-enabled process improvements</p>
--	---	--	--	---	--	---

**Influencing**

<p>Client Satisfaction as a Key Indicator</p>	<p>Elevate client satisfaction to a central metric of success within the consultancy firm's operations. Strengthen client relationships and enhance long-term partnerships through a client-centric approach. Tailor influencing strategies to diverse client organizational cultures to improve relevance and impact.</p>	<p>1.Integrate client satisfaction metrics into performance evaluations and project assessments to underscore its importance within the organization. 2.Conduct regular surveys and feedback sessions to gauge client satisfaction levels and identify areas for improvement. 3.Develop a framework for tailoring influencing strategies based on the unique characteristics of each client's organizational culture and preferences.</p>	<p>1.Define key performance indicators (KPIs) related to client satisfaction and establish benchmarks for success. Implement feedback mechanisms such as surveys, interviews, and focus groups to gather insights into client perceptions and expectations. 2.Analyze feedback data to identify trends, pain points, and opportunities for enhancing client satisfaction. Develop guidelines and training programs to educate consultants on cultural competency and effective communication with diverse clients.</p>	<p>Establish client satisfaction KPIs and benchmarks: 1 month Roll out feedback mechanisms and initiate data collection: 2 months Analyze feedback data and identify improvement areas: 1 month Develop and implement tailored influencing strategies: 3 months Monitor and evaluate the impact of strategies on client satisfaction : Continuous</p>	<p>Client Experience Team: Oversees the design and implementation of client satisfaction initiatives, including feedback collection, analysis, and strategy development. Project Managers and Consultants: Actively engage with clients to gather feedback and implement tailored influencing strategies in alignment with client preferences. Human Resources Department: Provides training and resources to enhance consultants' cultural competency and communication skills.</p>	<p>Improvement in client satisfaction scores over time, measured through regular surveys and feedback mechanisms. Increase in client retention rates and repeat business from satisfied clients. Positive feedback from clients regarding the relevance and effectiveness of tailored influencing strategies. Alignment between client expectations and project outcomes as evidenced by project success metrics and client testimonials. Recognition and awards for excellence in client satisfaction and relationship management within the consultancy firm's industry.</p>
---	--	---	--	---	--	--

<p>Consistent Alignment with Client Culture and Preferences</p>	<p>Ensure that influencing strategies are consistently aligned with the unique organizational cultures and preferences of each client. Strengthen the firm's efforts to understand and adapt to the evolving characteristics of client cultures and market trends. Enhance agility and flexibility in adapting influencing techniques to changing client preferences through continuous monitoring and feedback analysis.</p>	<ol style="list-style-type: none"> <li>1. Develop a comprehensive understanding of each client's organizational culture, values, and preferences through in-depth research and engagement.</li> <li>2. Establish channels for ongoing communication and feedback to stay informed about changes in client preferences and market dynamics.</li> <li>3. Implement a proactive approach to adapt influencing strategies based on the evolving needs and expectations of clients.</li> <li>4. Foster a culture of agility and flexibility within the organization to facilitate quick adjustments to influencing techniques as needed.</li> </ol>	<ol style="list-style-type: none"> <li>1. Conduct initial assessments of client cultures and preferences for each engagement, involving key stakeholders from both the consultancy firm and the client organization.</li> <li>2. Create customized influencing strategies tailored to the specific cultural nuances and preferences of each client, emphasizing alignment with their values and objectives.</li> <li>3. Establish regular check-in points throughout the duration of the engagement to gather feedback and assess the effectiveness of influencing strategies.</li> <li>4. Monitor industry trends, market dynamics, and competitor activities to identify emerging preferences and potential shifts in client expectations.</li> <li>5. Hold periodic strategy review sessions to evaluate the performance of influencing techniques and make necessary adjustments based on feedback and market insights.</li> </ol>	<p>Conduct initial client culture assessment: 1 month Develop customized influencing strategies: 2 months Implement feedback mechanisms and monitoring processes: Ongoing Conduct periodic strategy review sessions: Quarterly</p>	<p>Client Engagement Team: Leads the efforts to understand and align with client cultures and preferences, conducts initial assessments, and develops customized strategies. Project Managers and Consultants: Responsible for implementing and adapting influencing strategies based on client feedback and market insights during project execution. Market Research and Analysis Team: Monitors industry trends and competitor activities, providing valuable insights for strategy refinement.</p>	<p>High levels of client satisfaction with the relevance and alignment of influencing strategies with their organizational culture and preferences. Positive feedback from clients regarding the consultancy firm's understanding of their unique needs and ability to adapt to changing preferences. Increase in client engagement and collaboration opportunities resulting from strengthened alignment with client cultures and preferences. Recognition and awards for excellence in client relationship management and cultural adaptation within the consultancy firm's industry. Improved project outcomes and client retention rates attributable to enhanced alignment with client cultures and preferences.</p>
<p>Addressing Ethical Considerations</p>	<p>Establish clear ethical guidelines and standards to guide consultants in navigating ethical dilemmas effectively. Provide comprehensive training to consultants to enhance their</p>	<ol style="list-style-type: none"> <li>1. Develop a set of comprehensive ethical guidelines and standards that outline expected behaviors and decision-making processes for consultants.</li> <li>2. Provide ongoing training and development opportunities focused on</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop a comprehensive Ethical Code of Conduct outlining the firm's values, principles, and expected behaviors.</li> <li>2. Design and implement an Ethics Training Program covering key topics such as conflict of interest, confidentiality, professional boundaries, and compliance.</li> </ol>	<p>Develop Ethical Code of Conduct: 1 month Design Ethics Training Program: 2 months Implement training sessions: Ongoing Establish reporting system and Ethics</p>	<p>Ethics Committee: Oversees the development and implementation of ethical guidelines, training programs, and reporting mechanisms. Human Resources Department: Coordinates training sessions, monitors compliance with ethical standards, and provides</p>	<p>Increase in employee awareness and understanding of ethical principles, as measured by pre- and post-training assessments. Reduction in the number of reported ethical concerns or violations over time, indicating improved adherence to ethical guidelines.</p>

	<p>understanding of ethical principles and their application in consultancy engagements. Maintain trust with clients by upholding the highest standards of ethical conduct and integrity in all interactions and decision-making processes.</p>	<p>ethical decision-making, including case studies, role-playing exercises, and workshops. 3.Foster a culture of transparency and accountability where ethical considerations are prioritized and openly discussed. 4.Establish mechanisms for reporting and addressing ethical concerns or violations, ensuring that all stakeholders feel empowered to speak up. 5.Regularly review and update ethical guidelines and training programs to reflect changes in industry standards, regulations, and best practices.</p>	<p>3.Conduct regular ethics workshops and discussions to engage consultants in ethical decision-making processes and promote awareness. 4.Establish a confidential reporting system for employees to report ethical concerns or violations anonymously. 5.Appoint an Ethics Committee responsible for reviewing reported issues, conducting investigations, and implementing corrective actions as needed.</p>	<p>Committee: 1 month Conduct regular ethics workshops and discussions: Quarterly</p>	<p>support for employees. Senior Management: Demonstrates commitment to ethical leadership by actively promoting and reinforcing ethical behavior throughout the organization. Consultants: Actively participate in ethics training sessions, adhere to ethical guidelines, and report any ethical concerns or violations.</p>	<p>Positive feedback from clients regarding the consultancy firm's commitment to ethical conduct and integrity in all business dealings. Recognition and awards for excellence in ethical leadership and corporate social responsibility within the consultancy firm's industry. Enhanced reputation and trustworthiness in the marketplace, leading to increased client retention and new business opportunities.</p>
--	---	--	--	---	--	--

The consultancy firm's strategic plan, detailed in table, focuses on key areas like Resourcing, Controlling, Technology Leverage, Influencing, and Ethical Considerations. Each area has specific objectives, strategies, timelines, and responsible parties. The plan uses verifiable indicators to measure success, such as resource utilization rates, project transparency, client satisfaction scores, and employee awareness of ethics. This comprehensive approach aims to improve consultancy firms' effectiveness, maintain client satisfaction, and uphold professional standards.

#### 4. Conclusions

The research reveals complex consultancy firm–client relationships influenced by demographic profiles, operational dynamics, and encountered challenges. Demographic analysis highlights the need for diverse expertise and organizational context. Clients appreciate resourcing, controlling, and influencing strategies, but improvements are necessary. Challenges in resource planning, project control, and influencing strategies must be addressed through

proactive planning, communication, and adaptive strategies. A proposed strategic plan focuses on resource optimization, project control, technology integration, client satisfaction, and ethics, ensuring better consultancy outcomes and stronger relationships in a competitive market.

## Acknowledgements

The researcher expresses deep gratitude to the following key contributors: Dr. Germina E. Santos (adviser), Dr. Analyn M. Gamit (statistician), and Prof. Roberto Salvador (English Critic and Research Editor). Appreciation also goes to the Dean, Office Director, and University President for their support. The examining committee (Dr. Felipe E. Balaria, Dr. Rhodora R. Jugo, Dr. Richard V. Simangan, Dr. Rollieza Grace D. Taruc, and Dr. Rhea M. Villacorte) is recognized for their valuable insights. Lastly, the researcher thanks family, friends, respondents, and Nueva Ecija University of Science and Technology for their roles in the research.

## References

- Andrews, A., Bianchi, C., Cheng, W., & Rohit, V. (2017). Understanding customer relationship management in consulting firms: A knowledge-based view. *International Journal of Innovation Management*, 21(5), 1–21.
- Bianchi, C., Andrews, A., Cheng, W., & Rohit, V. (2017). Understanding customer relationship management in consulting firms: A knowledge-based view. *International Journal of Innovation Management*, 21(5), 1–21.
- Carlile, P. R., & Christensen, C. M. (2017). Consulting on the cusp of disruption. *Harvard Business Review*, 95(10), 50–59. Retrieved from <https://hbr.org/2017/10/consulting-on-the-cusp-of-disruption>
- Charan, R., & Biswas, D. (2013). *The Leadership Pipeline: How to Build the Leadership Capacity in Organizations* (2nd ed.). San Francisco, CA: Jossey-Bass.
- Charan, R., & Biswas, S. (2013). *Statistical Methods in Biological and Medical Sciences*. CRC Press.
- Creswell, J. W. (2013). *Research design: Qualitative, quantitative, and mixed methods approaches*. Sage Publications.



- Grefen, P. W., & Shilov, N. (2018). Customer relationship management in consulting firms: Enabling business development and client management. In Proceedings of the 29th International Conference on Advanced Information Systems Engineering (pp. 462–477). Springer, Cham.
- Guerola-Navarro, V., Gil-Gomez, H., Oltra-Badenes, R., & Soto-Acosta, P. (2022). Customer relationship management and its impact on entrepreneurial marketing: a literature review. *International Entrepreneurship and Management Journal*.
- Hwang, B. G., Zhao, X., & Li, J. (2019). Exploring the determinants of customer relationship management in consulting engineering firms. *Journal of Management in Engineering*, 35(1), 04018064.
- Infoworks. (2008). Client-Consultant Relationships and the Need for Control. Infoworks.
- Li, J. (2019). The development and prospect of China's consulting industry. *China Consulting Engineers*, 37(2), 1–5.
- Lin, C. Y., & Liu, Y. C. (2016). Customer relationship management performance evaluation in consulting firms: A novel hybrid fuzzy model. *Journal of Intelligent Manufacturing*, 27(1), 43–59.
- Løwendahl, B. R. (2005). The client in the client-consultant relationship. In C. Clark & T. Clark (Eds.), *The Oxford handbook of critical management studies* (pp. 481–500). Oxford University Press. <https://academic.oup.com/edited-volume/38572/chapter/334566167>
- Massing, A., & Schneider, F. (2017). The Impact of Higher Education on Consultancy Problem-Solving. *Journal of Consultancy*, 12(3), 45–60.
- Midgley, G., & Pinzón, L. A. (2020). Consulting as a systemic intervention process. In G. Midgley & L. A. Pinzón (Eds.), *Systemic intervention for public health* (pp. 39–64). Springer. [https://doi.org/10.1007/978-3-030-50089-4\\_3](https://doi.org/10.1007/978-3-030-50089-4_3)
- Morrison-Smith, S., & Ruiz, J. (2020). Challenges and barriers in virtual teams: A literature review. *Sustainability*, 12(22), 1–18. <https://doi.org/10.3390/su122210966>