

MODERN WORK STRUCTURE IN CONSULTING -  
A GUIDE FOR MANAGEMENT CONSULTANTS TO ADDRESS THEIR CLIENTS'  
CHANGING WORK STRUCTURE

by

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DISSERTATION

Presented to the Swiss School of Business and Management Geneva

In Partial Fulfillment

Of the Requirements

For the Degree

DOCTOR OF BUSINESS ADMINISTRATION

SWISS SCHOOL OF BUSINESS AND MANAGEMENT GENEVA

SEPTEMBER 2023

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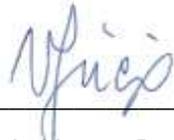
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## **Acknowledgements**

I would like to thank my mentor Dr. Velimir Srića for his continuous support and guidance while completing my degree.

Additionally, I would like to thank my husband, Joseph Christensen, for always being by my side during all the adventure this life throws at us. Thank you to my parents Bettina Pargmann and Klaus Sieling for believing in me and keeping me grounded.

**Modern Work Structure in Consulting -  
A guide for management consultants to address their clients'  
changing work structure**

A Literature Review

Presented

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Lina Christensen

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## **Abstract**

The purpose of this research is to provide a guide for how management consultants should engage with their clients as companies are redefining their future operations with remote and in person work. This research will utilize existing employee engagement studies and business psychology literature, as well as a qualitative analysis of interviews with 25 Accenture consultants from 5 different career levels. While existing research about employees' expectations about their work structure is mapped to the psychological benefits and draw backs of these structures, there is limited research about the effects of these on third party contractors like management consultants. This research focuses on addressing that missing piece.

## Table of Content

|   |    |
|---|----|
| 1. Introduction .....                   | 1  |
| 2. Literature Review .....              | 2  |
| 2.1 Remote work .....                   | 2  |
| 2.2 In person engagements .....         | 4  |
| 2.3 Balancing the future .....          | 7  |
| 3. Methodology.....                     | 9  |
| 4. Findings .....                       | 10 |
| 4.1 The Interviewees .....              | 11 |
| 4.2 The Process .....                   | 12 |
| 4.3 The Future of Work.....             | 18 |
| 5. Discussion.....                      | 22 |
| 5.1 The Meeting .....                   | 23 |
| 5.2 The Proposal.....                   | 32 |
| 5.3 The Project Kick-off.....           | 39 |
| 5.4 The Ongoing Project .....           | 47 |
| 5.5 The Milestones and Project End..... | 53 |
| 5.6 The Follow-up Conversations .....   | 61 |
| 5.7 The Relationship Management.....    | 66 |
| 5.8 The Conflict Management.....        | 71 |

|  |     |
|--|-----|
| 5.9 The Process .....                  | 77  |
| 6. Conclusion .....                    | 79  |
| Bibliography .....                     | 80  |
| Appendix.....                          | 85  |
| Appendix A: Questionnaire.....         | 85  |
| Appendix B: Interview Transcripts..... | 88  |
| Appendix B1: Analyst 1 .....           | 88  |
| Appendix B2: Analyst 2 .....           | 98  |
| Appendix B3: Analyst 3 .....           | 114 |
| Appendix B4: Analyst 4 .....           | 131 |
| Appendix B5: Analyst 5 .....           | 141 |
| Appendix B6: Consultant 1 .....        | 149 |
| Appendix B7: Consultant 2 .....        | 161 |
| Appendix B8: Consultant 3 .....        | 173 |
| Appendix B9: Consultant 4 .....        | 180 |
| Appendix B10: Consultant 5 .....       | 189 |
| Appendix B11: Manager 1 .....          | 200 |
| Appendix B12: Manager 2 .....          | 210 |
| Appendix B13: Manager 3 .....          | 222 |
| Appendix B14: Manager 4 .....          | 233 |

|                                      |     |
|--------------------------------------|-----|
| Appendix B15: Manager 5 .....        | 242 |
| Appendix B16: Senior Manager 1 ..... | 253 |
| Appendix B17: Senior Manager 2 ..... | 264 |
| Appendix B18: Senior Manager 3 ..... | 273 |
| Appendix B19: Senior Manager 4 ..... | 285 |
| Appendix B20: Senior Manager 5 ..... | 295 |
| Appendix B21: Director 1 .....       | 304 |
| Appendix B22: Director 2 .....       | 315 |
| Appendix B23: Director 3 .....       | 325 |
| Appendix B24: Director 4 .....       | 335 |
| Appendix B25: Director 5 .....       | 342 |

**Table of Tables**

Table 1: Overview of the interviewees ..... 12

**Table of Figures**

Figure 1: Overview of the process ..... 12

Figure 2: the full process..... 18

Figure 3: The initial meeting..... 23

Figure 4: The ideal initial meeting..... 28

Figure 5: The in person initial meeting..... 30

Figure 6: The remote initial meeting ..... 32

Figure 7: The proposal process ..... 32

Figure 8: The ideal proposal writing..... 36

Figure 9: The in person proposal writing..... 37

Figure 10: The remote proposal writing ..... 39

Figure 11: The project kick-off..... 39

Figure 12: The ideal project kick-off ..... 44

Figure 13: The in person project kick-off..... 45

Figure 14: The remote project kick-off..... 47

Figure 15: The ongoing project..... 47

Figure 16: The ideal ongoing project..... 50

Figure 17: The in person ongoing project..... 51

Figure 18: The remote ongoing project ..... 53

|   |    |
|---|----|
| Figure 19: The milestones.....                            | 53 |
| Figure 20: The ideal milestones and project end .....     | 57 |
| Figure 21: The in person milestones and project end ..... | 59 |
| Figure 22: The remote milestones and project end.....     | 61 |
| Figure 23: The follow-up conversations .....              | 61 |
| Figure 24: The ideal follow-up conversations .....        | 64 |
| Figure 25: The in person follow-up conversations .....    | 65 |
| Figure 26: The remote follow-up conversations.....        | 66 |
| Figure 27: The relationship management .....              | 66 |
| Figure 28: The engagement and value matrix.....           | 68 |
| Figure 29: The ideal relationship management.....         | 69 |
| Figure 30: The in person relationship management.....     | 70 |
| Figure 31: The remote relationship management .....       | 71 |
| Figure 32: The conflict management .....                  | 71 |
| Figure 33: The ideal conflict management .....            | 75 |
| Figure 34: The in person conflict management .....        | 76 |
| Figure 35: The remote conflict management .....           | 77 |
| Figure 36: The phased process.....                        | 77 |

## 1. Introduction

Consulting firms have been supporting their clients in the transition to modern ways of working by moving their processes and communications online and storing their data in the cloud. These changes in technology have enabled remote work long before the outbreak of Covid-19 but the global pandemic drastically expedited the progress and forced a large number of people to suddenly work from outside their offices. As employees have gotten used to the new ways of working, companies are having to consider their employees' changing demands while rolling out return to office programs. For consulting firms this means that they have to redesign their own employee engagements as well as their interactions with clients. This dissertation will leverage research about employee desires when it comes to designing modern work structures in combination with business psychology research and expert interviews with Accenture consultants to create a guide on how management consultants should engage with their clients in the future.

Accenture is a Global Fortune 500 company that serves “91 of the Fortune Global 100 and more than three-quarters of the Fortune Global 500” clients (Accenture, 2021). Their wide reach allows them to gather experience and insights across an array of different industries and company cultures. Combining the need for companies to restructure their employee engagement with the insights that Accenture consultants experience, this dissertation aims at answering the following research question:

**How should North American management consultants tailor their client engagement to the clients' company culture and the personality of key stakeholders?**

The result will be a guide, proposing various ways of engaging with clients to strengthen relationships and build trust.

The following begins with a research review highlighting the desire for remote work, the benefits of in person engagements and a review of a hybrid approach. Afterwards, the methodology of the intended research will be described, followed by a discussion and conclusion.

## **2. Literature Review**

Companies have long been studying employee behavior, trying to optimize employee engagements. “Employee engagement has become one of the most popular topics in management” (Saks & Gruman, 2014), but it’s also a topic that is constantly changing and developing. The purpose of this literature review is to summarize the most relevant opinions. This review explores remote work, in person engagements and finally the combination of both in a review of how to balance engagements in the future.

### **2.1 Remote work**

Covid-19 forced a large number of Americans to work from home. One study by MIT showed that 50% of employees surveyed switched from commuting to only working remote in early 2020 (Brynjolfsson, et al., 2020). With employees getting used to these changes, their expectations for work engagements are changing. EY found in a recent study that 90% of the 16,000 employees they interviewed want increased flexibility for when and where they work (EY, 2021). Companies are now faced with having to change their work structure to increase employee flexibility and retain talent. For consulting firms this means they have to ensure their own employees’ satisfaction in addition to restructuring how they are engaging with clients.

Flexible workplace and work time arrangements can also positively influence employee job satisfaction and work-life balance (Dilmaghani, 2020). But these positive attributes are

accompanied by complex emotions of leaders feeling less sense of community from their employees, having a harder time integrating new hires and some employees even experiencing depression from isolation (Sanchez-Burks & Sytch, 2021). During the sudden shift to remote work, companies recorded having a harder time keeping employees engaged (Oeppena, et al., 2020) and struggled with worker fatigue from video conferences (Bennett, et al., 2021) while working remotely. For management consultants, these struggles need to be addressed within their own company but also with their clients. With constantly changing projects and teams, it is especially important for management consultants to be conscious of the feelings of the people they are working with. This is critical to ensure people's wellbeing. However, the information required to appropriately complete projects must still be communicated efficiently.

A recent study leveraged the Job Demands-Resources (JD-R) model to analyze "employees' work engagement, job-related stress, and job performance" (Galanti, et al., 2021) during remote work. The JD-R is a model, established in 2006, that analyzes employee's well-being based on their job demands, physical and emotional stressors of the job, and positive physical, social and organizational resources (Mind Tools, n.d.). Galanti, et al. (2021) found that social isolation and family-work conflict negatively influenced productivity and work engagement while increasing stress for employees. A suggested solution is to increase communications among employees to reduce feelings of isolation. For consultants, this may be an opportunity to engage in multiple ways; by supporting their clients in the build out of technology that allows for more instant communications (instant messaging), structuring their engagements more interactively, for example agile through daily scrums; and also by openly addressing the topic of stress and isolation to build awareness of the mental constraints.

Another constraint is distraction. “Distracting environments, while fortunately proving not to be predictors of reduced productivity and increased stress, seem to exert a negative influence on the motivational drivers of people” (Galanti, et al., 2021). As previously addressed, it does seem very difficult to manage distractions in a remote environment when notifications keep coming up on phones and laptops. Household distractions are seemingly unavoidable and there is less accountability to stay focused when it’s very easy to go on mute during calls.

Working from home is also providing employees with increased autonomy and self-leadership, that promote productivity and engagement (Galanti, et al., 2021). For consultants, this may have multiple applications. For one, many companies may need to increase their trainings to truly enable their employees to learn to thrive with more autonomy. On the other hand, consultants can increase the feelings of power for employees by adding resources to ones responsibility for a specific project so that these employees get to lead with more autonomy. Consultants need to find the balance of keeping their clients feeling the positive attributes of being more motivated with this responsibility and supporting them in organizing the engagement in a way to keep the project in line and making it successful, especially if these are new responsibilities for a specific client.

So, while consulting firms are addressing these complexities in their own companies they also need to rethink how much and in what ways they should engage with their clients to avoid fatigue but keep building trust.

## **2.2 In person engagements**

The global pandemic is not the first-time companies are reducing the number of in person meetings. During the financial crisis of 2008 / 2009 companies tried to save money by reducing travel, and with that, in person meetings. While there are more than 10 years of research in

between, it appears that the importance of in person engagements to build meaningful relationships has not changed.

Business to business relationship management research done since the outbreak of Covid-19 highlights the “continued role of personal relationships and physical meetings in such relationships” (Arslan, et al., 2021). On the one hand consulting firms need to continue building trust with clients to lower their business transaction cost since there is a “causation between trust building and performance” (Kramer, 2006, p. 207). On the other hand, research also shows a correlation between Maslow’s needs hierarchy and the focus on the needs of attendees in business meetings (Douglass, et al., 2015). This indicates that meetings should be truly customized to the audience, which is currently changing and asking for more flexibility over having to be always in the office.

Previous research done during 2008 / 2009 further supports the continued role of in person engagements in various studies (Harvard Business Review, 2009, Forbes, 2009). It appears that there may be phases when face-to-face meetings are especially important: “respondents said face-to-face meetings are best for persuasion (91%), leadership (87%), engagement (86%), accountability (79%), and decision-making (82%)” (Forbes, 2009). Other research adds the importance of in person meetings for negotiations, maintaining relationships and to overcome cultural barriers (Harvard Business Review, 2009). Consultants should truly reflect on what they are trying to get out of a client meeting and consider the phase of the engagement they are in to decide on the correct form of engagement.

In addition, “more than eight in ten executives prefer in-person meetings to virtual contact, noting they create space for tough, timely business decisions and foster more complex strategic thinking” (The Washington Post, 2021). This indicates that it will still be important to meet in person,

especially for high level executives from both the client as well as the consulting firm to create stronger relationships and feel a shared sense of empathy, commitment and to negotiate. But it is important to not forget that these relationships cannot only be built at the top but need to be fostered throughout the organization in order to engage with those employees that have the details and insights consultants may need during their engagements.

For consultants especially, it may be more important than ever to time the in-person meetings to gain maximum efficiency. Especially in negotiations, consultants may be able to differentiate themselves from competitors and have an easier time being understood correctly as requests are more likely to be perceived correctly. Additionally, simple gestures like handshakes promote cooperation and therefore positively influence the negotiation for both parties (The Washington Post, 2021). The same research tracked performance drivers in employees and discovered that “35 percent of the variation in a given team’s performance was explained by the number of times team members actually spoke face-to-face” (The Washington Post, 2021). This further supports the previous argument that there may be projects, regardless of the levels of employees, where in person meetings will be highly important. These meetings will allow consultants to guide their clients in the strategically correct direction by having a deep understanding of their clients’ unique situations.

An additional phase not previously discussed is that the longer companies are forced to only work remotely, the more difficult it will become to create valuable long term strategies and think ahead instead of trying to solve already existing issues. “You want to get [people] out of their normal environment, because it makes them think differently” (The Washington Post, 2021). Otto Scharmer developed the U theory that shows how something new can only be created when people completely trust each other, let go of the present and then focus on thinking of and prototyping

new ideas (Scharmer, 2007 - 2021). Therefore, especially when advising clients on strategic decisions, trust, cooperation, and a judgment free relationship are all important to provide valuable guidance.

In summary, there are phases like negotiations, strategic decision making and involvement with high level executives that in person engagements will remain valuable.

### **2.3 Balancing the future**

While both structures, remote work and in person meetings, show benefits and drawbacks, consultants will not always have a choice in defining the structure as that may be defined by their clients and affected by time constraints. The one thing they can do is help find a balance and propose modern technologies that may help close the divide.

To bridge the gap between remote and in person meetings, business leaders face the challenge of managing new complexities like hybrid meetings, a mixture of remote conferences and in person meetings (Saatçi, et al., 2020). Consultants need to be conscious about how they engage in these settings as it may still be tempting for remote attendees to face distractions (Oeppena, et al., 2020) and at the same time allowing consultants to primarily bond with in person attendees in breaks, through small talk or even during after work events. It is therefore important to be aware of potential or perceived favoritism.

To mitigate some of the complexities, companies have been looking for technologies to combine the benefits of remote and in person meetings. Meeting platforms like Zoom and Microsoft teams are adding features that represent the functionalities of in person meetings through virtual whiteboards and break-out rooms (Novak & Watts, 2021). While these options help bring some of the functionalities of in person meetings back, like simultaneous brainstorming, consultants must

be conscious of their clients' abilities with these technologies and their personality to get the results they are hoping for.

Virtual reality (VR) and augmented reality (AR) technologies have the potential to further bridge the gap and merge the benefits of remote and in person meetings. These technologies are extended reality platforms where people can virtually meet in the same space to collaborate, be in the same sphere or room and even shake hands, using their avatars (Winn, 2020).

Accenture has already purchased 60,000 VR headsets to support virtual learning and collaboration, "the largest number any company has ever deployed" (Consultancy.uk, 2021). While the benefits of extended realities are being further researched, it is suggested that it may help people remember newly learned content better and make people feel more connected.

Another possible adjustment in the future could be to utilize in person meetings as fun get togethers over working sessions to demonstrate the importance of "a new relationship forged over a drink, a relaxing yoga class after a long day of panels or a level of trust from a casual conversation and a handshake" (The Washington Post, 2021). This would allow consultants to build trust with their clients' organization without only hearing the opinion of the few employees that are in person in meetings and may alter the perception of management consultants for some stakeholders from being a mistrusted contractor to being a trusted partner.

In addition, remote work may be able to help companies achieve other strategic goals that could positively influence their business. It appears that remote work is more environmentally friendly and can support the green agenda more companies are thriving for. Accenture for example is aiming at "achieving net-zero emissions by 2025" (Accenture, n.d.), which video conferencing may be able to support. "Videoconferencing takes at most 7% of the energy/carbon of an in-person meeting" (Dennis Ong, 2014). Depending on how much the employees identify with their

companies' strategic goals, this could help keep them feeling connected with their company and proud to work for their organization.

Overall, companies are facing a lot of seemingly contradicting dynamics that they have to address when defining their new workplace rules. For consultants it becomes even more important to identify their clients' culture and needs and tailor their engagements to their stakeholders' desires in order to keep building trusted client relationships.

### **3. Methodology**

This research is combining existing research about employee engagement, business relationship management and business psychology with experience from Accenture consultants to answer the research question:

**How should North American management consultants tailor their client engagement to the clients' company culture and the personality of key stakeholders?**

The result will be a guide for consultants and contractors to identify how to best engage with a client in varying situations to strengthen the relationship and build trust. This study will be explanatory research, addressing the cause and effect of why consultants should engage with their clients in a certain way. Further, the research will use abductive reasoning from qualitative data collected in the form of 25 interviews with Accenture consultants. The interviews will be semi-structured narrative inquiries with 5 analysts, 5 consultants, 5 managers, 5 senior managers and 5 directors, therefore interviewing 5 people from each of the main career levels at Accenture. The benefits of collecting data from people with varying years and levels of experience are the different focus areas in their client engagements and the varying level of familiarity with different technologies.

The questionnaire (Appendix A: Questionnaire) utilized for the semi-structured interviews is broken into 6 sections; introduction, experience, scenarios, in person vs remote work, future of work and final notes. The interviewees consented to be recorded and are kept anonymous. While all questions are open-ended to encourage a conversation, the scenario section additionally follows role play methodologies to think about the different phases in relationship building and the lifecycle of a client project.

After the interviews are conducted, the audio recordings are transcribed and coded for content analysis. The transcriptions were first broken into three sections for deductive coding; 1. The speaker (interviewer versus interviewee), the section of the interview being answered based on the questionnaire and, where applicable, if the narrative was addressing remote, in person or a hybrid work structure. Afterwards inductive coding is used to further analyze the narrative to avoid missing important themes mentioned in the interviews.

In summary, the qualitative data collected in semi-structured interviews allows for the mapping of a process showing the different options when engaging with clients in varying situations.

#### **4. Findings**

The findings highlight the primary section of the interviews, the scenarios, followed by a review of the supporting opinions on in person and remote work as well as the future of work.

The findings are divided into three phases; first a review of who the interviewees are in relation to their years of experience in consulting and with remote work, second a description of the client lifecycle as described in the interviews and thirdly a review of the interviewees' opinion on the future of work in regard to in person and remote work.

## 4.1 The Interviewees

All interviewees agreed to be recorded. Afterwards they were asked about their years of experience in consulting and their experience with remote work. The following table shows the distribution of interviewees for their years of experience, desired work structure and career level.

| Interviewee | Years of Experience | % of Work Time Spent Remote | Career Level   | Career Level Average Years of Experience | Average % of Work Time Spent Remote |
|-------------|---------------------|-----------------------------|----------------|--|-------------------------------------|
| 1           | 1.5 Years           | 100%                        | Analyst        | 1.3 Years                                | 90%                                 |
| 2           | 1.16 Years          | 100%                        |                |  |                                     |
| 3           | 1.5 Years           | 99%                         |                |  |                                     |
| 4           | 1.3 Years           | 100%                        |                |  |                                     |
| 5           | 1 Year              | 50%                         |                |  |                                     |
| 6           | 4 Years             | 50%                         | Consultant     | 3.5 Years                                | 68%                                 |
| 7           | 2.5 Years           | 80%                         |                |  |                                     |
| 8           | 5 Years             | 50%                         |                |  |                                     |
| 9           | 2.5 Years           | 90%                         |                |  |                                     |
| 10          | 3.5 Years           | 70%                         |                |  |                                     |
| 11          | 4.5 Years           | 45%                         | Manager        | 7.5 Years                                | 29%                                 |
| 12          | 10 Years            | 20%                         |                |  |                                     |
| 13          | 8 Years             | 25%                         |                |  |                                     |
| 14          | 8 Years             | 25%                         |                |  |                                     |
| 15          | 7 Years             | 28%                         |                |  |                                     |
| 16          | 10 Years            | 20%                         | Senior Manager | 14.8 Years                               | 19%                                 |

|    |              |              |          |            |     |
|----|--------------|--------------|----------|------------|-----|
| 17 | 8 Years      | 31%          |          |            |     |
| 18 | 18 Years     | 10%          |          |            |     |
| 19 | 18 Years     | 10%          |          |            |     |
| 20 | 20 Years     | 25%          |          |            |     |
| 21 | 23 Years     | 8%           | Director | 17.8 Years | 11% |
| 22 | 12 Years     | 16%          |          |            |     |
| 23 | 18 Years     | 10%          |          |            |     |
| 24 | 18 Years     | 10%          |          |            |     |
| 25 | Not Answered | Not Answered |          |            |     |

Table 1: Overview of the interviewees

One director called out that they used to travel to the client site during the week and would occasionally work from home, making it a hybrid approach years before the global pandemic (Appendix B24: Director 4).

## 4.2 The Process

The role play included in the interview walks through seven distinct situations in the relationship process with an optional eighth situation, crisis management, that was discovered through the interviews. The following section will review the process as described in the interviews.



Figure 1: Overview of the process

The initial meeting is the first step.

While not a single participant stated that it's enough to meet a new business contact online, the more experienced ones (Senior Manager and Director) stated that they would like to do a remote introduction, followed by an in person meeting. The meeting locations varied from in the office to over coffee or lunch to on the golf course. If an in-person meeting is not possible, the conversation should at least include an online video stream (Appendix B11: Manager 1). The intent for this step is to have a conversation and introduce each other and the company. Additionally, this step is the initial phase in forming a human connection to the other person by talking about people's personal lives before jumping into business, (Appendix B21: Director 1) and by taking the person out of the business atmosphere to have the initial conversation (Appendix B16: Senior Manager 1). The core question, however, is, what are these processes intended to build? One interviewee phrased it as "in the beginning it is important to reduce the emotional distance" (Appendix B11: Manager 1) but the core may be even deeper. The initial meetings are the first impressions that can set the foundation to explore if it is possible to build a business relationship or even business friendship. This approach changes the dynamic of the meeting, introducing the company now becomes the hook instead of the meeting goal.

Following the meeting, or series of meetings in step one is step two; the proposal writing.

The proposal shifts the initial relationship to a working relationship. The open communication established in the first phases is leveraged to encourage an open conversation about the core issues the potential client is experiencing. This allows the consultants to tailor the proposal to the situation at hand (Appendix B10: Consultant 5). However, especially the more experienced consultants

highlight the difference in knowing the financial buyer, the user buyer and the decision maker (Appendix B11: Manager 1, Appendix B18: Senior Manager 3). This requires the process to be iterative and open (Appendix B15: Manager 5) to create a proposal that meets the core requirements of the core buyers. As the audience grows by including the buyers from the client site, the consultants are also growing the team by including subject matter experts in the client conversations (Appendix B6: Consultant 1).

After successfully closing a proposal, the third step is to kick-off the project.

2/3 of the interviewees would prefer an in person kick-off. The kickoff primarily repeats what's stated in the proposal, but it is also an opportunity to introduce the actual project team and review the immediate next steps. The agenda entails a review of "go through key stakeholders, goals, objectives, timeline, work structure" (Appendix B5: Analyst 5). While some interviewees only view the kickoff as a formality of what was already agreed on (Appendix B11: Manager 1), others view this as a core meeting to set the tone for the remainder of the engagement, making it especially important to get senior leadership support from the client to show the level of commitment expected from the team (Appendix B21: Director 1). When considering this a core meeting, the meeting structure also changes to encourage informal attire and lunch to encourage open conversation from the start (Appendix B16: Senior Manager 1), polls to get people's opinions (Appendix B7: Consultant 2), ice breakers (Appendix B3: Analyst 3, Appendix B25: Director 5), and workshops at the hubs (Appendix B14: Manager 4).

The fourth step covers the engagement during an ongoing project.

The general consent is that it varies strongly by stakeholder how the project should be structured. However, more interviewees mention remote interactions for the majority of the engagement with complimentary in person meetings for important check-ins, depending on the logistical challenges to see each other (Appendix B8: Consultant 3). The core is to find a regular structure that works for the client, while the number of check-ins may vary, these meetings should be structured and scheduled (Appendix B10: Consultant 5). In addition, the project teams need their own internal check-in calls to review their progress and identify potential game stoppers (Appendix B15: Manager 5). Outside of the status calls, the means of communication may also shift depending on the established relationship with the clients, so it could move to spontaneous calls and instant messaging (Appendix B20: Senior Manager 5). This phase should be used to further build rapport and foster the relationship (Appendix B25: Director 5).

The fifth step of the process is the milestones.

The interviewees highlight the importance of avoiding surprising the clients during a read out. The client should be included in the process of preparing for the milestone readout and know the next steps and outcomes (Appendix B21: Director 1, Appendix B25: Director 5). Multiple interviewees suggest having a PowerPoint presentation to jointly review and refine the material, (Appendix B9: Consultant 4, Appendix B10: Consultant 5) but recommend being flexible about meeting remote or in person. The general guidance provided by the interviewees is that working sessions and important readouts should be in person (Appendix B8: Consultant 3) but a recap of the work being done could be remote (Appendix B24: Director 4).

The sixth step is follow-up conversations with the client about project extensions.

The core difference between selling an extension compared to the initial project proposal is that the consulting team has a proven track record working with the client and have built trust with the client (Appendix B2: Analyst 2, Appendix B20: Senior Manager 5). The consulting team should not try too hard to sell an extension but rather work with the client to show them the gap and a backlog of activities, from which the client can feel like it is their idea to continue the work (Appendix B14: Manager 4, Appendix B15: Manager 5). In addition, the timing of this sales phase is different with follow-on conversations starting around  $\frac{3}{4}$  of the way into the project (Appendix B13: Manager 3). Towards the end of the project, the consultants should increase a sense of urgency so that the project team can stay on and does not move on to different clients and projects (Appendix B22: Director 2). The overall idea is to “sell by not selling” (Appendix B23: Director 3) to keep the client naturally engaged and have a more casual conversation with them about the follow-on work.

The final step in a regular process is the relationship management.

Around a quarter of the interviewees specifically mentioned LinkedIn as a tool to stay in touch, making it the most consistent answer to this question. The interviewees further describe that a mix of formal and informal meetings are beneficial to further establish and keep the relationship (Appendix B4: Analyst 4). The goal appears to be to treat the client as a friend (Appendix B11: Manager 1), build trust (Appendix B7: Consultant 2) and have regular conversations with them to create a partnership instead of only meeting during sales pitches (Appendix B24: Director 4). To balance the relationship between friendship and professional engagement, the interviewees suggest a variety of potential activities from inviting clients to conferences and company organized events, e.g., international women’s day if that’s a cause they are passionate about (Appendix B21: Director

1), to grabbing lunch (Appendix B12: Manager 2) or coffee (Appendix B19: Senior Manager 4). The relationship needs to be organic (Appendix B24: Director 4) to build an authentic connection (Appendix B23: Director 3), regardless of how the person is engaged, be it in person or remote.

The eighth and final step is conflict management.

A third of the interviewees mentioned an additional situation regularly encountered with clients, conflict management. The conflict can look very differently, from the consultant interpreting the client as being defensive against the project or the specific consultant themselves (Appendix B11: Manager 1), the client not being happy with the project progress or outcome (Appendix B13: Manager 3), to even uncontrollable or unforeseeable situations that could put the project at risk (Appendix B15: Manger 5). All directors mentioned conflict management, escalation, and data consumption for clients as additional steps to the process, possibly because they are the final source of escalation and are most experienced with it. “How you react in those situations is much more telling and is much more indicative of what your relationship with them will be like in the future” (Appendix B21: Director 1). While conflicts are tricky situations to deal with as they have the potential to change the relationship with the clients, one thing to remember is to not assign blame and work together to overcome the problem (Appendix B25: Director 5). The interviewees agree that it is easier to dissolve conflicts in person to truly encompass the cues better and have a more genuine conversation (Appendix B21: Director 1).

The full project involves eight steps, as highlighted in the graphic below. In addition, regardless of the process step or the medium of communication, the most general comment mentioned throughout the interviews is to highlight humanity (Appendix B24: Director 4, Appendix B19:

Senior Manager 4). Remembering that we are all human and not just computer voices help ensure respect, avoid hurting feelings and listen to the nuances in voice and choice of words, especially when you cannot see each other.



Figure 2: The full process

### 4.3 The Future of Work

The interview included multiple sections about the interviewee's opinion on remote and in person work as well as the future of work to further understand the benefits and drawbacks of different work settings.

The interviewees share different stories on how they had to reorganize themselves when they suddenly started to work remote. These efforts include making a conscious decision to get organized (Appendix B12: Manager 2), to create a new morning and meal routine (Appendix B14: Manager 4) and especially to be more intentional about taking breaks (Appendix B15: Manager 5). Since working remote, people are snacking more throughout the day instead of having proper meals (Appendix B5: Analyst 5) and having to take more effort to be physically active and at least go on walks (Appendix B4: Analyst 4). In addition, work hours spread throughout the day (Appendix B6: Consultant 1) which is a draw on mental health for many (Appendix B18: Senior Manager 3, Appendix B22: Director 2) but at the same time offers more flexibility to add personal tasks to the workday (Appendix B16: Senior Manager 1). Contrary to feeling more mentally exhausted, after a phase of transition multiple interviewees mention that they were able to get into a better routine for physical activities and their physical health has actually improved (Appendix

B17: Senior Manager 2, Appendix, B22: Director 2), especially those interviewees that have been doing the job for over 10 years.

The interviewees also mention a strong preference for hybrid work to varying degrees. Some would like to go back to 10% - 20% travel only for key meetings (Appendix B5: Senior Manager 5), others only call out that they want in person meetings to build rapport with clients and for brainstorming workshops (Appendix B14: Manager 4, Appendix B15: Manager 5) and to create balance (Appendix B22: Director 2). Others emphasize the hybrid approach but prefer working primarily in person, like three days a week, (Appendix B18: Senior Manager 3) and rank working from the client's office or consulting office over remote work (Appendix B19: Senior Manager 4). When asked about their opinion on remote work specifically, the most common benefits are the increase in flexibility (Appendix B3: Analyst 3, Appendix B7: Consultant 2) and the time savings of not having to commute, get ready and, especially for families, organize everything while they are away from home (Appendix B9: Consultant 4, Appendix B5: Analyst 5). Drawbacks are the ease of distraction (Appendix B5: Analyst 5, Appendix B6: Consultant 1) and that it requires more structure and self-discipline to get work done, but also the intentional scheduling of breaks since everyone appears to be always available (Appendix B4: Analyst 4, Appendix B20: Senior Manager 5).

When working in person, the main benefit, that was repeated multiple times, is the relationship building with both the clients as well as the project teams. Collaborative working sessions and brainstorming benefit from being in the same room (Appendix B9: Consultant 4, Appendix B15: Manager 5), but it's also a chance to create joint experiences and have casual conversations in the hallway or when celebrating milestones (Appendix B11: Manager 1, Appendix B15: Manager 5).

Drawbacks for consultants are the demands that come with travel like being apart from families and exhaustion from long days (Appendix B3: Analyst 3, Appendix B20: Senior Manger 5).

Interviewees also highlighted the difference in personalities and how they are affected differently by in-person and remote work. The general consensus is that that introverts may benefit from remote work by being able to stay behind their cameras even when they have speaking roles in online meetings (Appendix B8: Consultant 3), while extroverts may miss the comradery and energy they receive from a room full of people (Appendix B9: Consultant 4). Additionally, in person meetings may be easier for virtual learners as they have the material closer in front of them and can see the images drawn on whiteboards. Different tools can provide some of the interaction that whiteboarding sessions offer back into remote calls such as Mural, Mirrors (Appendix B19: Senior Manager 4), demos and VR applications (Appendix B14: Manager 4) as well as opinion boards like Menti to support the normal screensharing (Appendix B18: Senior Manager 3).

All interviewees ultimately agree that the future is a hybrid workstyle, the exact definition of a hybrid workstyle however varies strongly based on the interviewees' personalities and preferences. Some would like to go to the office once a quarter (Appendix B16: Senior Manager 1), others would prefer to have 20% of time in the office (Appendix B25: Director 5) or up to 50% (Appendix B15: Manager 5). The definition of a hybrid workstyle further varies based on the industries their clients are in (e.g., high-tech, mining, finance) (Appendix B2: Analyst 2, Appendix B25: Director 5) and their region (e.g., Silicon Valley, Houston, New York City) (Appendix B25: Director 5). The overall consensus is that it is client driven and that consultants will travel on demand (Appendix B8: Consultant 3, Appendix B15: Manager 5, Appendix B21: Director 1). One interviewee added that the project structure will depend on the written agreement between the client and the consulting firm but that the more important learning has been the clients'

transformations to a more flexible workstyle and their system architecture that will enable quicker integration for consultants into the clients' systems (Appendix B18: Senior Manager 3).

Two interviewees expressed opposing opinions on how the future consulting firm is going to be structured. One believes that people will get staffed on local projects to cut travel time (Appendix B8: Consultant 3) while another one foresees more globalization of firm and staffing to truly provide clients with the most knowledgeable person on a topic (Appendix B12: Manager 2).

When asked for their opinion on success in the final remarks, the most consistent message is to manage and exceed expectations with clients (Appendix B4: Analyst 4, Appendix B12: Manager 2) and to build strong relationships of trust (Appendix B15: Manager 5). In order to achieve that, communication needs to be consistent with the client and the team (Appendix B1: Analyst 1). As everyone is different with unique needs (Appendix B2: Analyst 2) it is important to truly listen (Appendix B4: Analyst 4) and to meet the clients' communication style (Appendix B5: Analyst 5). It is integral to be flexible (Appendix B8: Consultant 3) and to build open relationships (Appendix B9: Consultant 4). Possible ways to get there are to regularly take the clients and teams temperature (Appendix B12: Manager 2), have more frequent, but short meetings to check in and to be as transparent and open as possible (Appendix B14: Manager 4). One interviewee did point out the struggle in balancing remote and in person work: "I would say that it's such a catch 22 because autonomy seems like freedom in some ways, but I feel as if it just led to more mental health struggles, purpose and otherwise and burnouts" (Appendix B7: Consultant 2).

It is also important to note the infrastructure required to enable a hybrid work style. Interviewees warn that clients should not underestimate their employees' technological needs in order to get their job done (Appendix B12: Manager 2). These systems should be carefully selected, and the data generated analyzed for more data driven results (Appendix B18: Senior Manager 3). However,

even with system driven strategies, the interviewees caution clients to continue taking the company culture, personality and trust building into consideration and to take the time and chat and build a personal connection at work (Appendix B18: Senior Manager 3).

With the need to build trust quickly one interviewee describes how they profile their clients to understand their communication styles up front, which they believe makes them stand out as instantly understanding the client better than others (Appendix B23: Director 3). The personal connections are not just intended for the client but also important to build within the consulting firm to make sure people stay with a particular employee, especially for those employees that stay 100% remote (Appendix B25: Director 5). When asked for how the interviewees believe this level of trust is achieved, they say that the foundation is “how you present yourself and how you come across” (Appendix B25: Director 5). A good regular check-in with oneself is to ensure the project is driving value and success with questions like “what are we doing? Why are we doing it? How is it going to be used?” (Appendix B18: Senior Manager 3). The ideal outcome and definition of success is described as joint trust and joint success. An example is the client getting promoted after successfully closing a big project with the consultants (Appendix B17: Senior Manager 2).

It appears that all interviewees see the need for a hybrid approach. Not one person wanted to work either completely remotely or completely in person. The focus of the work style is more about how to communicate most effectively, regardless of the setting. The question therefore remains on how to balance and optimize remote and in person interactions. To further analyze the hybrid approach, the following section will follow the phases of the client engagement.

## **5. Discussion**

This research shows an increased demand from employees for more flexibility of time and place. For management consultancies, this means they must address their employees' desires and identify new ways to engage with clients to meet their new structures.

For consultants, this research indicates that there are different dynamics they must manage in the future; their clients future work structure, their own work structure, their and their partner companies' strategic goals. It is important for consultants to be flexible towards their clients' desires to maintain and build trust and performance.

This research will be observed at one point in time (cross-sectional), so opinions may change with more familiarity of modern ways of engagements. In addition, the researcher will need to be cautious about the reliability and validity of the research, in particular researcher bias since the researcher works at the case company, as well as validity since the research utilizes qualitative data.

In the following sections a dive into the eight-step process will be conducted (Figure 3: The Full Process), using the methodology described in Appendix B18: Senior Manager 3 to ensure that each phase is focused on value delivery. The steps are broken into three subsections; “What are we doing? Why are we doing it? How is it going to be used?” This analysis will utilize the data collected in the interviews as well as ideas presented in relevant research articles to create the process.

## 5.1 The Meeting



Figure 3: The initial meeting

**What is the meeting?**

The first step is the meeting of the consultant and a potential client. Multiple interviewees mention trying to identify a person in their network that can give them a warm introduction to the person or client they are trying to meet (Appendix B17: Senior Manager 2, Appendix B23: Director 3). The reason behind it being that there is initial interest, slight trust and a common topic to talk about. If a warm introduction is not possible, people are either meeting in person through a common cause, like a joint volunteering opportunity (Appendix B7: Consultant 2). Alternatively, they reach out on social media, for example through LinkedIn (Appendix B18: Senior Manager 3). The fourth option is to cold call someone, meaning to reach out virtually without relying on a common contact, which is the least preferred option.

**Why are we meeting?**

Meeting new people and business contacts cannot be viewed solely as part of the sales process, there is more underlying value to networking and expanding one's social circle. The Harvard Business Review highlights four reasons why people should network more; to learn, to identify common interest, to think more broadly about what you can give and to find a higher purpose (Gino, et al., 2016). The first reason, to learn, should remind the consultant that they must first listen to the person they are with instead of jumping to the sales phase (Gino, et al., 2016). Consultants need to stay on top of new trends and find out what truly concerns their clients. Listening is a crucial step to truly learn, that for many people requires a change in process from purely waiting to respond to intentional listening.

Additionally, listening can help achieve the second motivator, to find common interests (Gino, et al., 2016). This is a core reason for the interviewees to mention warm introductions or alternatively

meeting at an event; to have background information or an indication what the other person is interested in. This is building the foundation for a longer relationship, common ground. “Numerous studies in social psychology have demonstrated that people establish the most collaborative and longest-lasting connections when they work together on tasks that require one another’s contributions” (Gino, et al., 2016).

The third motivator is to identify what one can bring to the table and to enhance the new connection in a two-way relationship that both parties benefit from (Gino, et al., 2016). Research found that people who focus “on the collective benefits of making connections (“support my firm” and “help my clients”) rather than personal ones (“support or help my career”) felt more authentic and less dirty while networking, were more likely to network, and had more billable hours as a result” (Gino, et al., 2016). This step can gently remind, both the consultant and the client, that there is synergy in their cooperation. Identifying each other’s gaps but also strengths will naturally support continued conversation.

In summary, consultants need to network and meet people for their companies benefit as well as their own wellbeing and success. The core is to find commonality and areas of interest between them and a new person. The next section focuses on how to achieve that.

### **How should an ideal meeting be structured?**

As mentioned before, there is no perfect process that works for everyone. One interviewee goes as far as profiling new contacts to know their preferred ways of communication before talking to them (Appendix B23: Director 3). Whenever that is not possible, the majority of interviewees describe their generally preferred way of meeting new contacts through a warm introduction from a friend (Appendix B17: Senior Manager 2, Appendix B23: Director 3). Working with friends and

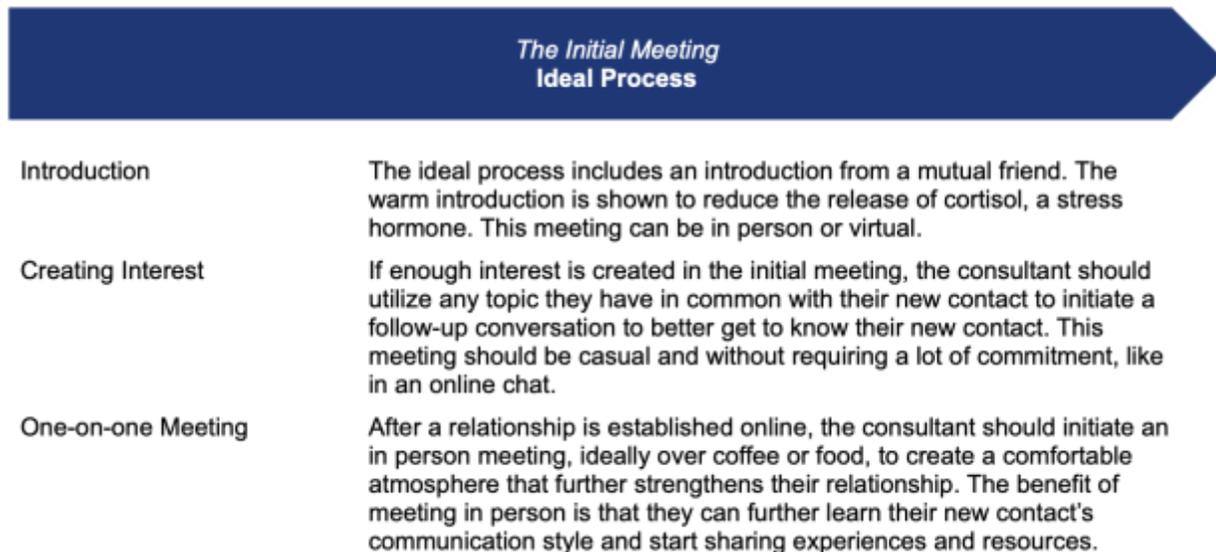
creating friendships at work and in business is a conflicting topic because of the benefits but also drawbacks it can create professionally and in private (Kowtun, 2019). The benefits of using each other's networks and having a cheerleader on your side are as true as the challenges of possibly having doubters of your success and people who use your business success for their advantage (Kowtun, 2019). The drastic change in the physical work life separation caused by the pandemic may also be an opportunity to rethink the approach to business contacts.

Studies have shown that conversations can trigger large releases in cortisol, the stress hormone which can "cause a person's prefrontal cortex to stop working the way it's supposed to. The prefrontal cortex is where we develop new ideas, where we engage in creative thinking, where we experience empathy, and it's where our good judgment resides" (Ruthman, 2016). The initial meetings should focus on building empathy and interest, instead of stressing the other person out and having their hormones block their cooperation before it begins.

Leveraging a mutual friend for the introduction and treating the initial meeting as an opportunity to meet a potential future friend may reduce some of the stress (Appendix B11: Manager 1). The mutual friend may also help give an introduction of the new business contact before meeting them so the consultant can be aware of common areas of interest and topics of value for both parties to talk about. To ensure that the interests are common and both parties perceive the meeting as valuable, the interviewees suggest a virtual meeting first, followed by an in-person meeting. "An initial meeting would be virtual, but with video on and then looking to sort out during that meeting what their comfort level is, and then probably be pushing for an in-person meeting after that" (Appendix B8: Consultant 3). After a successful online meeting, the first in person meeting should still be casual, for example over coffee or lunch (Appendix B16: Senior Manager 1). The first impression of the in-person meeting is important. The intent is to come across as authentic and

natural, “open up your posture so your legs are at a wide stance, but you’re relaxed. Make eye contact, offer a firm handshake” (Deutschendorf, 2017). Further research shows that sharing a meal, especially items like chips and salsa as appetizers, increases cooperation since the parties are already dividing resources (Woolley & Fishbach, 2019). Even with the idea to start cooperating, it is unrealistic to close a business transaction on the first meeting, so people should let go of that expectation and continue to focus on building a connection. Research supports this point for external meetings but also for company internal teams. A study showed that firefighters who eat lunch together say that is integral to their team operating effectively (Tulshyan, 2019). The additional benefit a casual get together provides is that it breaks up the day and provides a new scenery especially to those people that have been feeling like they are online 24/7.

In summary, the ideal meeting is a two-step process of having a virtual call with or at least through a common contact, followed by an in-person meeting. The goal is to provide a stress-free opportunity to meet and reduce the emotional distance to build a relationship. A shared meal especially can help with getting to know a new person in a casual atmosphere and be an initial opportunity to cooperate and share resources.



*Figure 4: The ideal initial meeting*

### **How should an in-person meeting be structured?**

Fewer interviewees mentioned growing their network in person, but those that do describe meeting someone at an event they are both interested in, like a volunteer opportunity (Appendix B7: Consultant 2) or an industry meeting (Appendix B16: Senior Manager 1). Depending on the setting and how familiar someone is with that setup, they may feel more or less nervous. For example, someone attending the same volunteering opportunity every year may know the process and what to expect and therefore be able to visualize what is about to happen and reduce their fear (Card, 2017). On the other hand, going to a conference and entering a room of strangers makes a lot of people nervous. While normal, there are two effects that influence first impressions and the first interaction. First, “Fear causes cortisol to be released into the brain, which makes it harder to think creatively and remember things” (Dr. Lynda Shaw as quoted by (Card, 2017)) but thanks to the pratfall effect, displaying weaknesses can also make people appear more likable (Card, 2017). Regardless, if someone is nervous or not, the same advice from the previous section should still apply when first reaching for someone’s hand in introduction “open up your posture so your legs

are at a wide stance, but you're relaxed. Make eye contact, offer a firm handshake" (Deutschendorf, 2017).

In the next few seconds, try to stand out and build a connection. Standing out can help one be remembered. Do this by asking more intriguing questions instead of talking about the weather or by having a signature clothing item like colorful socks (Clark, 2014). Also, as the conversation continues, it is important to find commonalities (Clark, 2014). The initial commonality could be the deeper reason for why both parties are at the event. To find these, people need to ask questions and be good listeners, a skill the interviewees keep bringing up as a means to deepen relationships (Appendix B4: Analyst 4, Appendix B21: Director 1). Once the common grounds are established, it is okay to just talk. The initial meeting is about making a connection, not closing a sale on the first meeting. Before parting ways, people should exchange contact information and ideally a reason to follow up (Clark, 2014).

"... the follow up was an email and further meetings and those meetings have taken place virtually just because that's the world in which we interact for business. But I don't think it would've gone as smoothly had we not met in person and had just a knowledge of who each other is" (Appendix B7: Consultant 2). Depending on the timing and if an opportunity for cooperation has already been identified, the following conversations can be emails or phone calls first, followed by lunches and coffees as described in the section above to deepen the cooperation.

One of the other benefits of meeting in person is that it may be easier to see each other again in person, especially if it was not just a one-off event.

Even an in-person meeting relies on technology and follow ups using online tools like emails and phone calls. The important benefit is developing a better feel for the other person quicker through having all means of communication from words to behaviors.

In summary, meeting someone in person at an event may make the initial conversation slightly easier as there is a joint experience to talk about. The key at larger gatherings like these is to become memorable and not just fade in. Ideally, the consultant will build an initial connection during the first conversation by listening well and finding a follow-up reason to stay in touch.

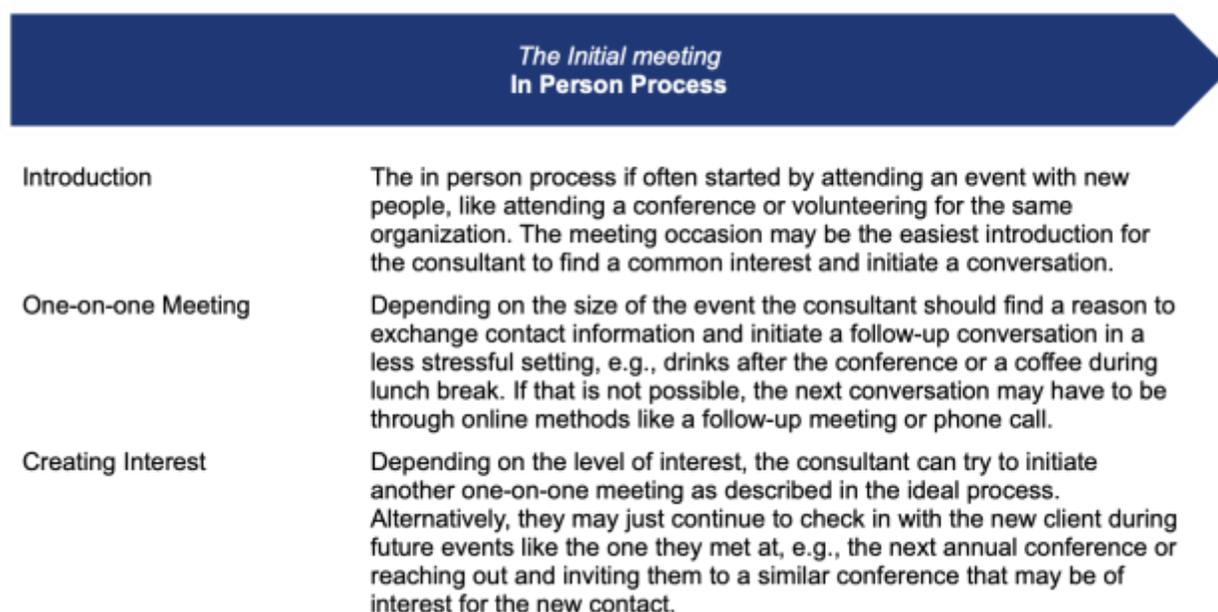


Figure 5: The in person initial meeting

### How should a remote meeting be structured?

How do people meet business contacts online? Many interviewees mention LinkedIn as the primary source to meet new business contacts or stay in touch with others, (Appendix B18: Senior Manager 3, Appendix B24: Director 4) or a phone call (Appendix B24: Director 4). While receiving people's contact information and assuming they are open to network and on portals like LinkedIn is easy, people are now competing with the overload of messages they receive per day. Statistics show that in 2017 269B emails were sent globally per year. This number is projected to increase to 376.4B per year in 2025 across 4.6B users (Statista, 2022), meaning that every user receives over 80 emails per day. So how can people stand out while trying to network remotely?

The first suggestion is to make yourself visible, for example by posting relevant articles on LinkedIn that are attracting people to proactively reach out to the consultants (Appendix B24: Director 4). Using the same logic and reverting it to make the reach out, it becomes clear that the focus needs to be a lot more on the unique value they can provide to stand out to a targeted group of people. The first step is to identify a relevant topic that the consultants know and that is relevant to the people they are trying to reach. Therefore, experience and deep industry knowledge, or data analysis can help identify the customers' motivators (Magids, et al., 2015). Secondly, consultants should do a deep analysis of their best existing customers and their network to gain an even better understanding of the motivators for the highest-value group (Magids, et al., 2015). Thirdly, they need to turn the core messaging into an emotionally attractive message. Having an attractive and relevant message and additionally triggering the emotions of urgency or scarcity will increase the likelihood for their initial reach out message to stand out. “So, the art and science of communicating the what's in it for them based on what your company can provide them has to be much more the headliner or the title of a book” (Appendix B23: Director 3).

Once someone responds, the mindset should still be on that “Twitter mindset” (Appendix B23: Director 3), of scheduling a quick conversation and reducing the emotional distance by hearing the other persons voice, whether it's a phone call or ideally also seeing their face in a video call. After that, maintaining the relationship and growing it follows the same rules as described above through regular follow-ups via emails, more sharing of relevant articles on social media platforms and calls.

In summary, remote meetings make it even more important to stand out with your own brand and value message to not get lost in the amount of stimulation people receive every day. Afterwards,

it is recommended to move the conversation from quick, social media like conversations to actual talks over the phone or video calls to gain a better understanding of the other person.

Overall, the initial meeting focuses on expanding the consultant's network by forming a connection with industry partners through a common point of interest which could be a mutual friend, an activity or event both are interested in or topic of interest on social media platforms. The goal of the initial conversations is to take out the stress, so the other person does not release cortisol but stays relaxed and enjoys the conversation. Consultants should try to find a hook or excuse to stay in touch after an initial conversation to actually start building a relationship.

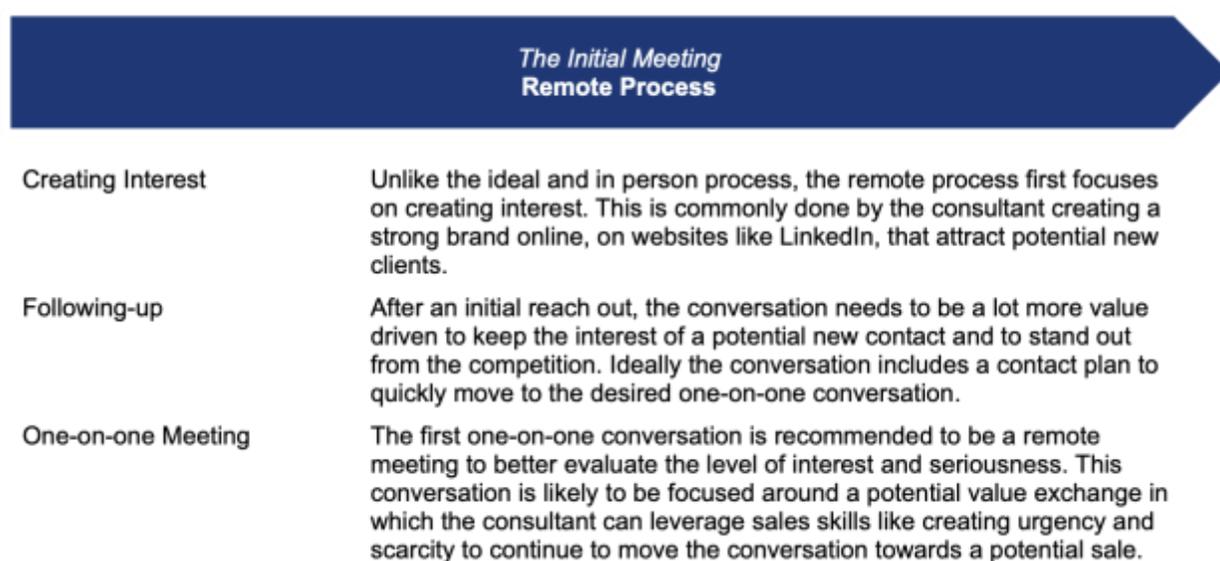


Figure 6: The remote initial meeting

## 5.2 The Proposal



Figure 7: The proposal process

**What is the proposal?**

The second step is the proposal, the first attempt at a business transaction with a new network partner. The proposal itself is a suggestion for a business project. Most of the time, it is a written document, followed by an oral presentation to introduce the proposed project team in addition to the plan. In consulting, a proposal often consists of the proposed plan, a summary of the consulting firm's most relevant skills and unique positioning, and the price.

**Why is the proposal relevant?**

While the final proposal is very relevant in showing the potential client what the consulting firm is agreeing to do over a set timeframe, the process of agreeing on the proposal is integral to the business relationship. The process itself should be iterative and open (Appendix B15: Manager 5) so the final proposal can be tailored to the potential client (Appendix B10: Consultant 5).

While the goal may seem to be obvious; to win the deal, it is important to keep the larger goal in mind of creating credibility with the client (Appendix B14: Manager 4, Appendix B24: Director 4), and to remember that the goal is to build a lasting relationship and not just a one-time deal.

**How should the ideal proposal be structured?**

The ideal proposal is tailored strongly to the clients' needs. In order to understand what the client is asking for, the proposal team needs to keep the process iterative (Appendix B15: Manager 5) and ideally include in person meetings for honest conversations in which the consultants truly listen to their clients underlying needs and wants. Therefore, the first step of the ideal proposal process is to learn how to build trust in the consultants' capabilities and to listen for the clients'

core problem to create a solution both parties can trust to meet what they are trying to accomplish together (Appendix B21: Director 1).

To increase the rapport and conversation, an in-person meeting is suggested in a comfortable atmosphere. The intent is for the consultant to truly listen, to identify the problem, but also the underlying values of the client. Tine Merkel (2011) breaks it out into three steps to gauge the problem. The first step is to assess the client and identify their values, what drives them. The second is to better listen and ask follow-up questions about why something is important to them or what they are trying to achieve. And thirdly, to adjust the conversation to lead with the values of the other person to make them feel understood and continue to gain a deeper understanding of what the end solution intended to solve. To get to the level of trust and understanding to communicate values, the consultant needs to take the conversation from being purely transactional (listening and responding) or positional (advocating and inquiring) to being transformational (Balboa & Glaser, 2019). A transformational conversation allows both participants to cooperate and work together on the proposal, while releasing the hormone oxytocin and activating the prefrontal cortex which “helps us make judgment calls, have empathy and compassion, and anticipate the future” (Balboa & Glaser, 2019).

After understanding what the client is asking for, the sales lead can start developing the material for the client. The consultant will need to understand what role the contact is playing in the overall sales process, whether they are the financial buyer, the user buyer, or the decision maker (Appendix B11: Manager 1, Appendix B18: Senior Manager 3). Identifying their role helps identify the gaps in the proposal to also win the other key parties over. While it is common industry practice to utilize existing material, the team needs to find a balance between showing industry standards and tailoring the solution. This is where it becomes important to keep the process iterative. Iterations

and reviews held are two fold, on one hand the proposal is getting further refined based on the feedback received to meet the desires of the other buyers, on the other hand it is intended to increase the trust of the main contact in the consulting firm. A paper analyzing the sale of life insurances highlights the balance of the first sale to balance doing whatever is necessary to close the deal and still build trust instead of just saying all the right things (Oaks, 1990). Oaks proposes a triangle that the client is evaluating; the cognitive dimension being expert knowledge in the field, a normative dimension of being of service and a status dimension of occupational prestige. When applying this principle, it becomes clear that the proposal does not only need to include the solution blueprint but also, and possibly primarily, build the trust in the team and service to be offered addressed and tailored to the stakeholder buyers. The cognitive dimension becomes a review of the assets and capability most relevant to the project and the client, the normative is a review of how the project would be structured based on how involved the client would like to be and the final dimension, the status, is a review of reference projects and awards won based on the clients overarching principles.

The read out of the prepared material should ideally be in person, to continue to learn about the client, just like in the beginning of the process. The presenting team should listen closely, read the client's body language and adjust their narrative based on the perceived atmosphere and follow-up questions.

In summary, this step is primarily about building trust in the key stakeholder making the buying decision in the consulting team and their capabilities. This is primarily achieved through listening, tailoring the offer, and becoming a partner in the process.

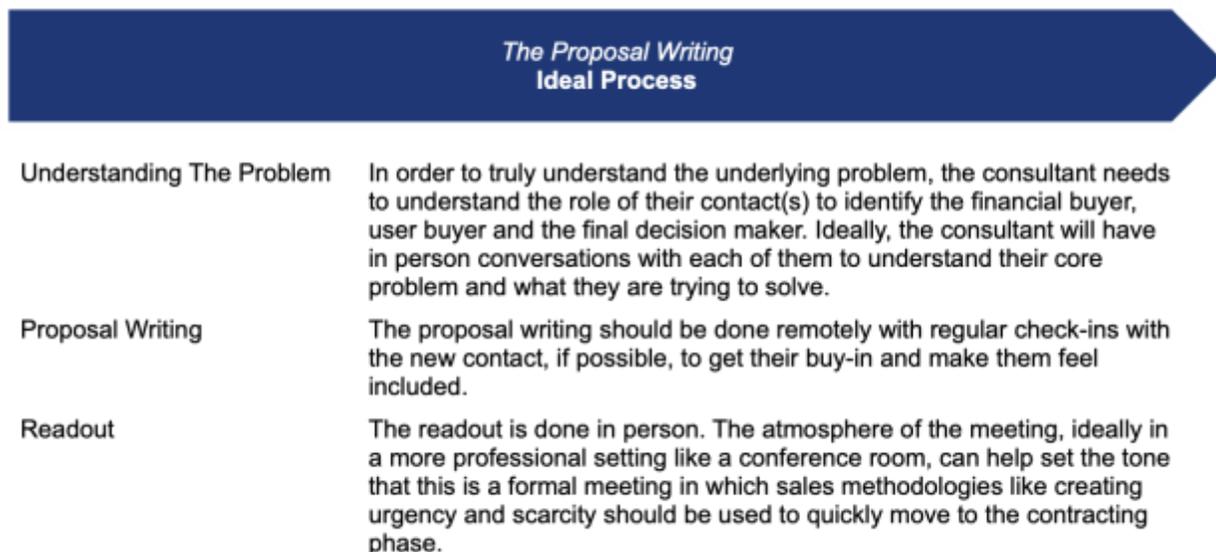


Figure 8: The ideal proposal writing

### How should the in person proposal be structured?

The in person proposal process closely mimics the ideal process, where a lot of the understanding gathering and feedback is collected in person. The balance that needs to be achieved is to build trust without giving too much of the proposal away for free during casual side conversations.

There are different negotiation tactics that can be used should the relationship turn too much into free advice sessions instead of closing a deal. The core is to be prepared and aware of the situation, which can be done by thinking through the proposal process before getting too deep into the proposal writing and “mapping out the negotiation process can help you avoid making false assumptions during your talks, in addition to enabling more efficient and streamlined negotiations” (Shonk, 2022). The process will still involve customizing the solution, but with increased awareness about not giving too much of the solution away in free advice to where the client does not see the need to buy. Setting deadlines and boundaries as well as asking for exclusive negotiation time may help (Shonk, 2022). What these techniques are doing is creating scarcity and urgency to close the deal. There are three different forms of scarcity, “supply-based scarcity has

the largest effect on purchase intentions, followed by time-based scarcity, and demand-based scarcity has the smallest effect overall” (Bartonab, et al., 2022).

Multiple interviewees also mention varying meeting locations depending on the intent of the meeting, for example, coffee meet ups or lunch are preferred to informal meetings to strengthen the relationship (Appendix B19: Senior Manager 4). Conference room meetings, on the other hand, create more work-like environments that allow for more planning activities (Appendix B4: Analyst 4).

In summary, the consultants need to build a close relationship while still creating the urgency to close the deal. Awareness of different scarcity methods and setting the right atmosphere for the conversations can help promote the sale.

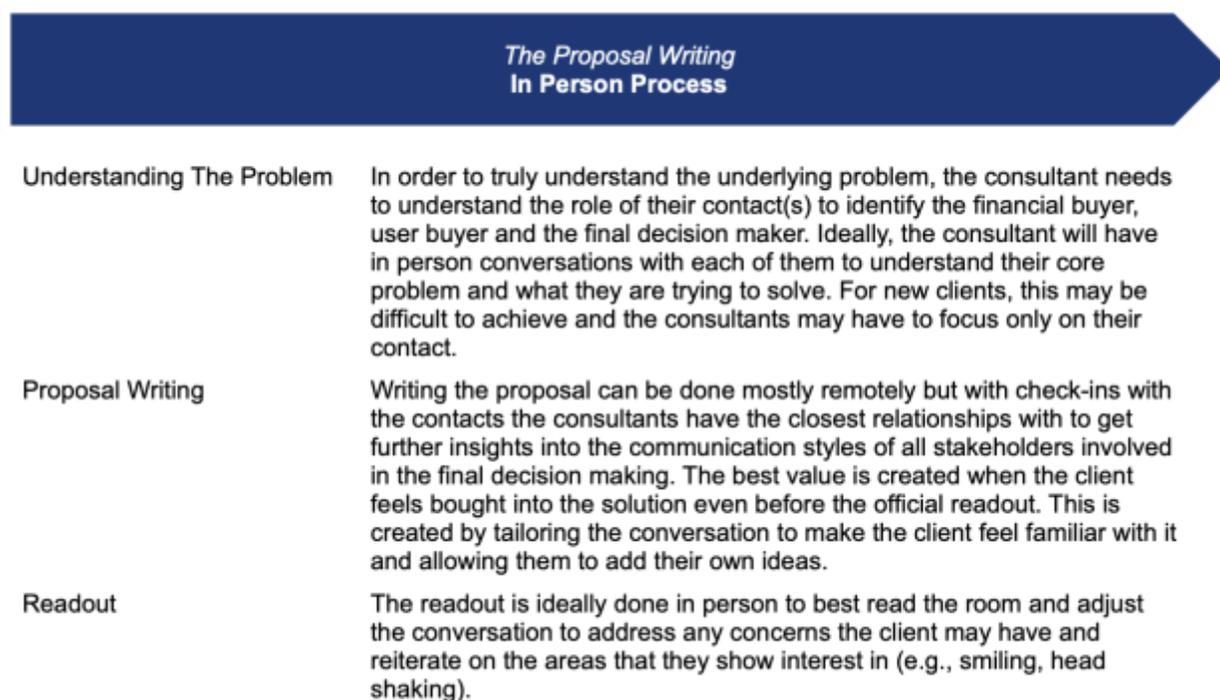


Figure 9: The in person proposal writing

**How should the remote proposal be structured?**

Contrary to the in person proposal process, the challenges of a fully remote process are in creating differentiation and trust with the potential buyers without having the opportunity for a handshake or in person meeting.

During the pandemic, a survey shows that 46% of sales people found digital sales channels less effective, 27% about the same and another 7% found digital sales channels more effective (Arslan, et al., 2021). The same research suggests enhancing customer intimacy through phone and video conference follow-ups as well as virtual lunches and events (Arslan, et al., 2021).

To break it out further, the initial interaction about the proposal should be a conversation focused on listening (Appendix B21: Director 1), as in the ideal process. The iterative proposal writing process then might be expanded into having virtual lunch and learn events (Arslan, et al., 2021) to provide the entire group of buyers and stakeholders with an overview of the solution but also to collect feedback to further refine the solution. Especially dependent on the solution to be sold, the consulting firm should consider going further than video calls and create memorable experiences through virtual and augmented realities to resemble more of an in person interaction with the potential buyer. Virtual Reality (VR) supports the cooperation and communication of people since they can get a sense of the physical space of the other people, e.g., how far away they are standing, but are also exposed to more of their nonverbal communications. “VR meetings remove all distractions and allow participants to be fully focused in the meeting - and have a proven 25% higher attention in comparison to video conferencing” (Burns, 2020). Virtual events like lunch and learns will further allow the buyer to gain value in the sales process by being educated and for the consulting firm by building trust and gaining valuable insights into the client in a less interrogating fashion. “Incorporating VR into your next conference, trade show, or exhibit will help you make your brand presence more memorable, engaging, and profitable” (Burns, 2020).

In summary, the biggest hurdle to overcome in solely remote sales processes is building trust with the buyer and standing out from competitors. Changing the sales process by opening events to slightly larger audiences and using modern technologies like VR can solve those gaps.

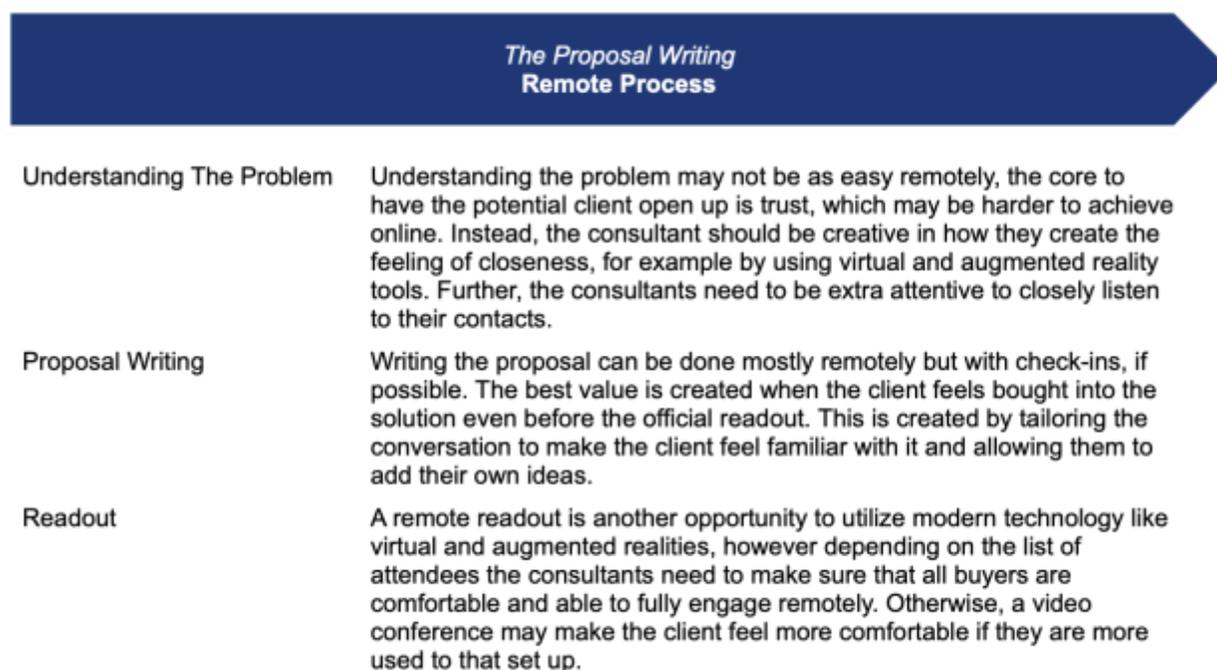


Figure 10: The remote proposal writing

### 5.3 The Project Kick-off



Figure 11: The project kick-off

#### What is the project kick-off?

The third step is the project kick-off after successfully closing the deal. The consulting firm successfully closed the deal, found a project team, and has agreed on a start date with the client. The project kickoff aligns the involved stakeholders on the purpose of the project, ensures

everyone is aware of the timeline and the desired level of commitment. The audience in the kickoff may be slightly different from the sales group, depending on who the buyers are. In the interviews, the kickoff and the final project readout were the most controversial topics when it comes to how important or not it is to be physically in the same location (Appendix B8: Consultant 3, Appendix B14: Manager 4).

### **Why is the project kick-off relevant?**

The project kick-off sets the tone for the engagement. “They need to talk about the goal, the objectives, where they see and answer questions and get their directors and managers all on board with what's happening now” (Appendix B21: Director 1). The kick-off should be an opportunity to level the stakeholders that are actively participating in the project and is an opportunity to further identify other employees for potential help like IT support to get access to the clients’ site, etc. “You want to have enough of the organization where they understand a bit of the carrot and the stick. The carrot being the incentives and the value that they get out of it, the stick is kind of like the business objectives that they have to meet and understand that there are consequences for not helping out with this and it's not meant as a threat but to drive through change” (Appendix B21: Director 1).

### **How should the ideal project kick-off be structured?**

As mentioned, there are different opinions about the structure of the project kick-off which is why the ideal project kick-off leverages business psychology research specifically focused on how first impressions influence working partnerships.

The ideal project kick-off is an in person meeting with the relevant stakeholders, that may vary from the people that the project got sold to. When creating the kickoff event, consultants should keep in mind that they are often asking for not publicly available information from the audience, so building trust up front and showing the value of the project for them helps set the tone of cooperation and value. Therefore, the consultants need to consider the atmosphere they are aiming for; cooperative, friendly and professional working environment. Ideally the meeting is in a conference room or innovation center, that allows for interactive communication (Appendix B14: Manager 4), like ice breakers or brainstorming with sticky notes. Next, the consultants should set a clear agenda. Important questions to proactively answer for the audience, especially those potentially not included in the sales phase, are

1. Project Objectives
2. Project Sponsor
3. Stakeholders
4. Team member roles and responsibilities
5. Scope and Out of Scope work (Brownlee, 2022)

The global pandemic has drastically changed the working environment for a lot of people, not just consultants. Without constraints on needing or not needing to be in the office or remote, the ideal working relationship is a hybrid that is focused more on the desired outcome than the structure. Building this working relationship can lead to “high levels of productivity, idea generation, strategic thinking, collaboration and brainstorming...” (Malta Business Weekly, 2021). So how should this relationship be structured?

The relationship in this phase is truly with the client partner that’s working with the team, over the leadership that is signing the project contract. If not already done, the project leads need to spend

some time analyzing this client's preferred working style. It is suggested to spend time with this client and their direct employee(s) to have a workshop about working styles. This can be done on the day of the kickoff or later in the engagement in case the kick-off is very short. It should start by having an open conversation about how the clients like to communicate, whether by instant messaging or email, meeting in person or via phone call. Once that is established it is advised to talk about the meeting cadence. Even when going back to remote work, checking in regularly to continue to build the relationship but also to stay top of mind and make the client feel like they are involved but also getting required information from them is very important. The second part of the workshop should be spent talking about the regular meeting cadence, e.g., 2 – 3 times a week for 30 min per zoom call, as well as how often they should meet in person, e.g., 4 days per month, and the major milestones that are also in person readouts with their respective leadership teams. Third, the team should spend some time getting to know each other, planning out the next week of the project when they are back remote but also leaving room for conversations, e.g., what their families have planned that same week.

During this workshop and after, the project team should spend time further analyzing their clients' working style to better tailor their communication. A popular model for this is the Social Styles Model from Roger Reid and John Merrill. This model evaluated people based on their level of assertiveness and level of responsiveness, resulting in them being evaluated as one of the following four categories:

- “Driving (Tell Assertive + Control Responsive) Characteristics: Courageous, committed, clearly defined goals, determined.
- Expressive (Tell Assertive + Emote Responsive) Characteristics: Talkative, positive, enthusiastic, emotional, dramatic.

- Amiable (Ask Assertive + Emote Responsive) Characteristics: Dependable, charming, patient, dislike pressure, sociable, cautious.
- Analytical (Ask Assertive + Control Responsive) Characteristics: Thinker, inquisitive, hesitant, serious persistent, careful.” (CEOPedia Management Online, n.d.)

This evaluation shows how to engage with the client but also how to customize the deliverables to make them easier to understand. E.g., the driver is focused on process, they should be presented facts and be allowed to come to their own conclusions since they like to make decisions. Presentations should be clear and to the point. Knowing the style will help structure the engagement.

Another item to define with the client and have an open conversation is the communication channels. The consultants are talking about being 100% available to the client through their email, instant messaging, and their private phones (Appendix B20: Director 1). While these tools are available when in person or remote, it appears to be more of a pressing matter since the pandemic when everyone was always available instead of, for example, being stuck on an airplane. The conversation needs to be had with the client on how they would like to engage. Also, it's advantageous to address expected working hours.

The other meeting cadence that needs to be identified is the governance. Governance of project ensures that the team is making the committed progress as well as are a sounding board for advice and critical decisions. While the actual governance meetings will be picked up again in the following section, the structure should be decided early on.

Further research advises the consultants to leave room towards the end of the working phase to ask “What is your biggest concern about our ability to be successful?” (Brownlee, 2022). Open ended questions like this leave room in the working relationship for open communication and indicate

that the project team is open to potentially critical conversations as well as shared “expectations and ways of working and build some commitments around that” (Appendix B25: Director 5).

After the working sessions, it’s advised to continue building the relationship and changing the environment to be less formal, like a happy hour (Appendix B25: Director 5).

In summary, the kick-off should be used to understand the client’s working styles and initiate the regular communication that the consultants need to succeed jointly with the client. The goal of this meeting is to establish the working structure for the project but also sets the tone for the two teams, client and consultant, to work together.

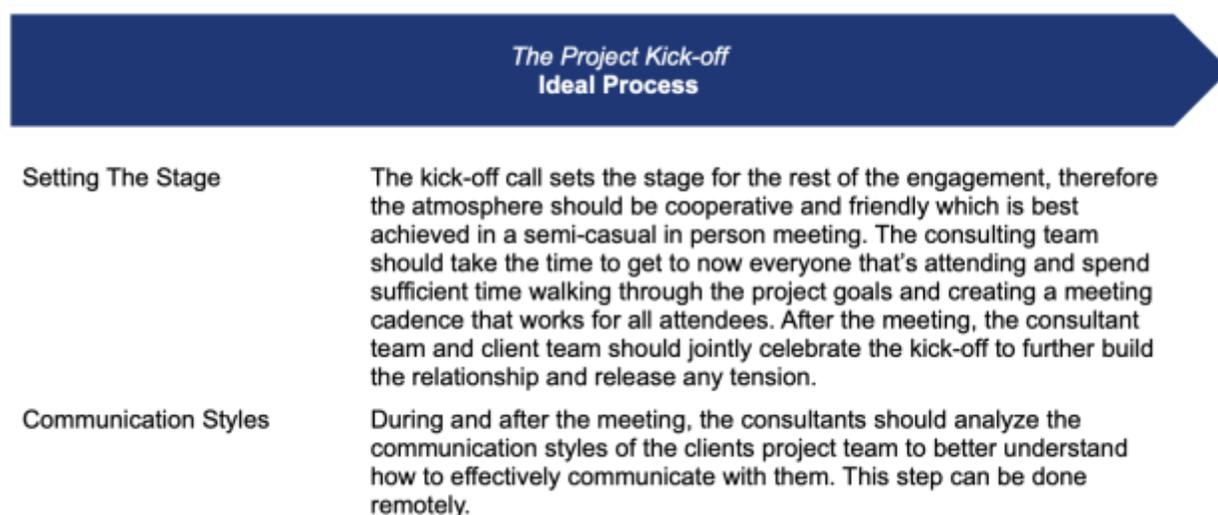


Figure 12: The ideal project kick-off

### **How should the in person project kick-off be structured?**

The in person kick-off is structured, as highlighted in the ideal process, by having an introduction round, possibly with an ice breaker, setting a clear agenda going through the scope of the project and then an informal get together like a happy hour. Important from an in person engagement is to get the time commitment from the client by setting regular follow up calls to ensure continuous conversation throughout the project. Ideally senior leadership highlights the importance of the

engagement to ensure that the right resources continue to attend the meetings by providing the “carrot and stick” (Appendix B21: Director 1).

The second benefit of having this meeting in person is to use the opportunity to build comfort with the client and use the opportunity during the meeting for a personal conversation or afterwards during either a coffee break or a joint dinner to celebrate the start of the project. Making the client feel comfortable from the start will support the ongoing working sessions and information sharing as the client is otherwise likely to release cortisol from the stress of having these new conversations and insecurity about what to share. Higher levels of cortisol will then hinder the development of ideas and creative thinking (Ruthman, 2016).

In summary, the in person kick-off aims at defining the work structure going forward but is also an opportunity to set the tone for the upcoming working sessions and build the required trust and comfort to enable the client to share more openly and join in creative sessions as required.

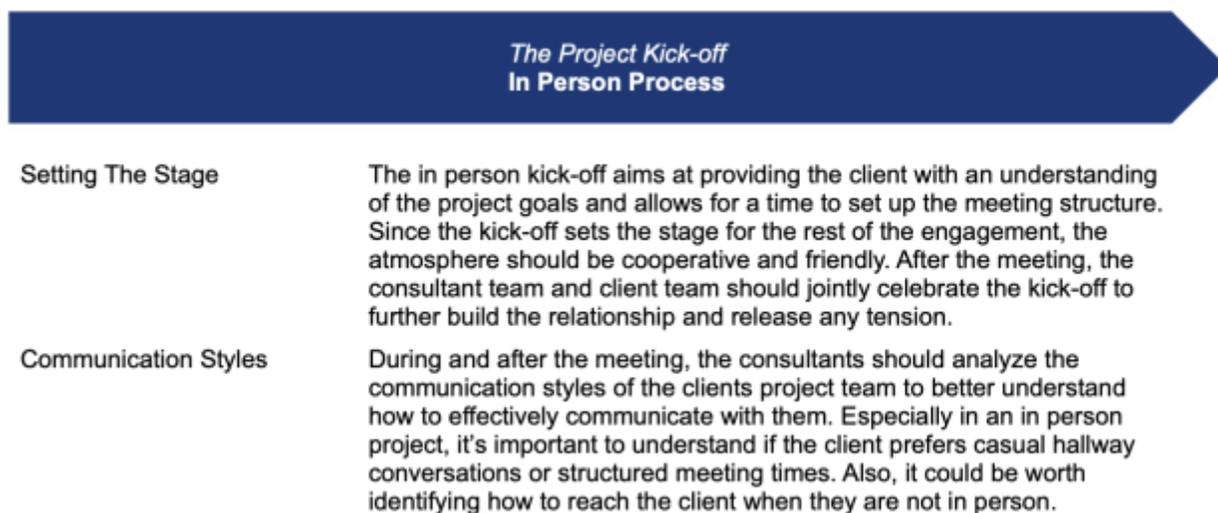


Figure 13: The in person project kick-off

**How should the remote project kick-off be structured?**

The remote kick-off needs to allow the space to create a working relationship. Especially since it may be a new audience and a new topic, it's advantageous to have the camera on and ask all attendees to do the same. Additionally, to lighten the mood, the call should start by encouraging everyone to provide a brief introduction ideally with a fun fact or ice breaker so that everyone has already had a chance to talk.

Just like the ideal in person kick-off, a kick-off call should provide an overview of the project:

1. Project Objectives,
2. Project Sponsor,
3. Stakeholders,
4. Team member roles and responsibilities, and
5. Scope and Out of Scope work (Brownlee, 2022).

To increase the engagement especially in a remote call, it is advantageous to change the format from presentation mode to an interactive activity. For example, the project objective could be written on a virtual whiteboard, but the attendees of the call can fill in their roles and responsibilities underneath it, as they see fit. Afterwards the group can review these and update and discuss them. For consultants, these initial calls can be a bit more nerve-wracking as they have yet to get a feeling for how familiar this specific project team is to interactive work. Therefore, the consultants should have a strong structure for their activities, create easy to understand tasks and come prepared to give examples and show initiative to fill in the virtual white board in case the client is hesitant.

Before ending the call, the team should identify the work structure going forward and agree on a regular meeting time for check-ins.

In summary, the initial meeting will set the underlying tone on how engaged the consulting team would like to see the client in their meetings and workshops. The consulting team should be sensitive and take note of the client's reaction and how to best involve them.

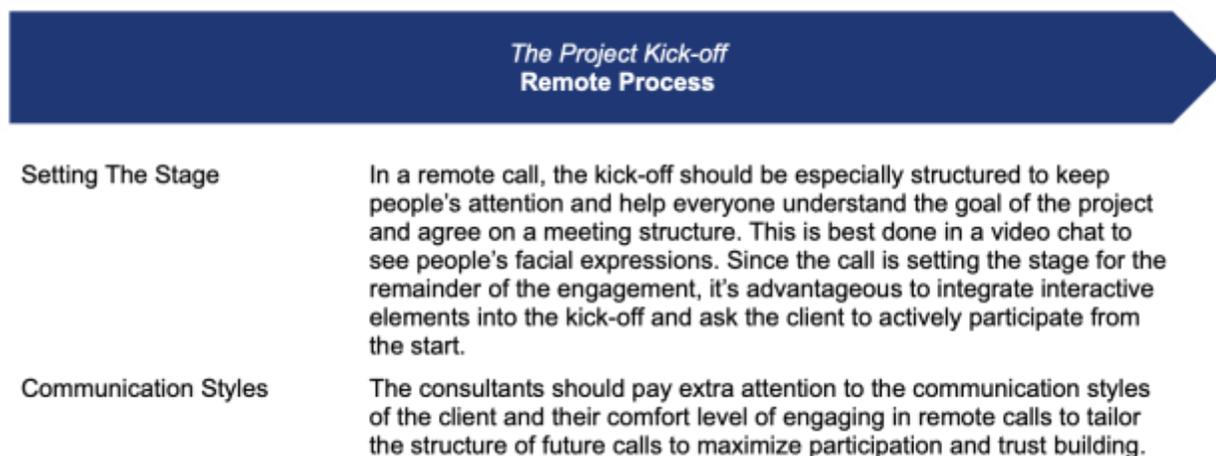


Figure 14: The remote project kick-off

## 5.4 The Ongoing Project



Figure 15: The ongoing project

### What is the ongoing project?

The fourth step is the ongoing engagement between the project team of consultants and the client. This phase is the core working time of the project and the longest phase, in duration, of the process. The project team and client need to identify their working structure, meeting cadence and how to continue to build their working relationship. While every project can be drastically different in

duration and level of required input from the client, they all require the project team and client working team to work together effectively.

### **Why is the ongoing project relevant?**

The ongoing project is often the longest working time between the project team and client with consulting projects lasting from a few months for strategy assessments to years for implementations. This working phase shows the relevance of having a strong relationship with the client to meet deadlines, make it through the ups and downs of a project and to determine if an extension of the project contract is of interest to the client.

### **How should the ideal ongoing project be structured?**

After the initial kickoff and evaluation, the project team can start their routine. The regular check-ins can be done remotely as can some of the workshops with the project team, if the agenda is clear and focused on collecting data over brainstorming. The interviewees suggest having the camera off in regular calls but to include it in special situations, (Appendix B13: Manager 3) like those workshops when new members are joining or in more serious conversations. More generally, the consulting team needs to be very intentional about the goal of the meetings they have with their clients. Regular check-ins can be more casual (e.g., without camera (Appendix B13: Manager 3)) as they should be easy and comfortable for the client to attend. The two teams should build the trust that is required to have meetings that are low in cortisol release, or stress hormone release (Ruthman, 2016).

More creative working sessions, like brainstorming sessions should be activity driven and allow the participants the chance to engage and release dopamine to encourage their interaction

(Charney, 2021). Depending on the technical affinity of the audience, these activities can be traditional sticky-note sessions where a group of people get together to brainstorm, write their ideas on sticky-notes and then organize them on a wall. For more technical groups, the same activity can be done in virtual whiteboarding sessions or in virtual reality rooms. The consultants should ensure that they are well prepared and have easy to understand “game” rules and a clear structure to not stress the client, which would hinder their creativity.

In more meetings that are driven around making decisions (e.g., having the client decide between three different approaches), the consultants need to be very prepared to confidently present their ideas but also to allow their clients the opportunity to ask questions and help them weigh their different options as a strong partner. Creating a mind space for the client to make decisions more clearly is important. The consultants should support the release of endorphins through physical activity, like walking or through human touch, like shaking hands on a deal (Charney, 2021).

In summary, the consultants need to structure the meetings during the engagement based on their desired outcome. Regular interactions should be low-stress but interactive, whereas decision meetings may require more structure.

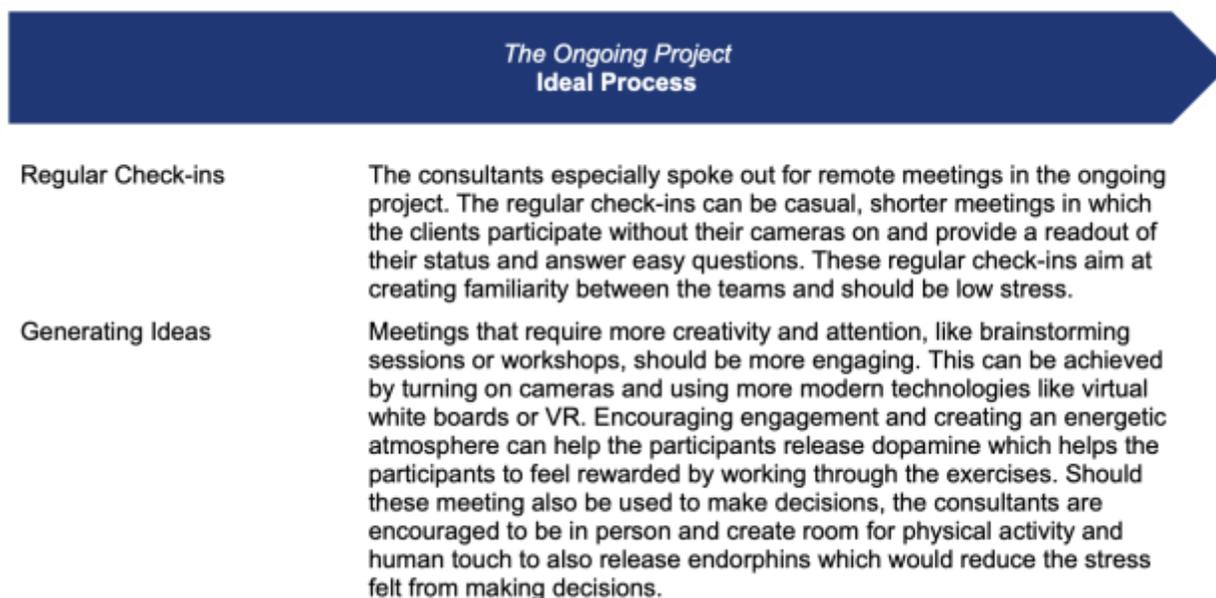


Figure 16: The ideal ongoing project

### How should the in person ongoing project be structured?

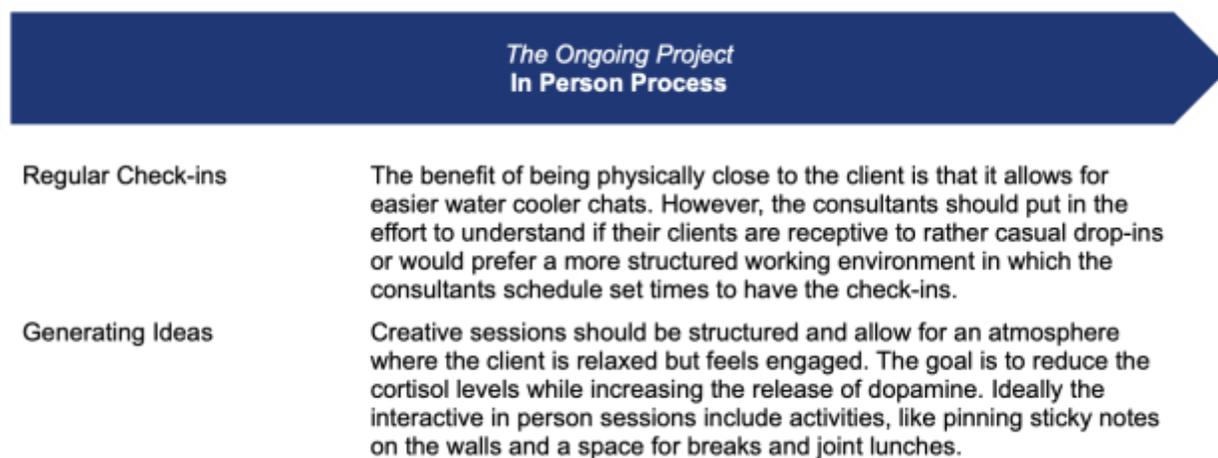
The traditional in person project for most consultants did involve getting on a 5am flight on Monday mornings, arriving at the client site around 9am and then flying home on Thursday afternoons or evenings. While this took a lot of time away from their private lives and families, it also allowed for close relationship building with their clients. The global pandemic has drastically changed the working environment during the project engagement because clients are seeing the change in budget spent on consultants travel expenses and consultants are spending a lot more time at home. However, depending on the personality of the client and the client's industry, some truly favor or even require in person interactions. 78% of interviewees stated in a survey that they feel more included in the office (Owl Labs, 2021), which is the area consultants should strongly focus on when being in person with their clients during the engagement.

For in person meetings, the consultants need to be aware of their client's personality, just like in the ideal process to know how to structure the in person engagement. Is the client more

spontaneous and likes drop in visits to quickly answer a question, or should there be regular cadences to discuss the topic? What meetings should be held in the conference room or on a walk to the coffee station? As discussed in the ideal structure above, regular meetings and easy decisions can be done in very casual engagements like drop-in visits. Interactive sessions will need more structure around booking meeting rooms and possibly even providing food and creating truly safe environments for the reduction of cortisol and the release of dopamine ((Ruthman, 2016), (Charney, 2021)).

Directional decisions should be made in low stress settings, like going on a walk or over coffee. Important decisions and milestones may require more structure as will be discussed under the next process step.

In summary, the in person engagement allows for more physical closeness and less formality in the relationship, however this informality should be targeted to also ensure a professional working atmosphere.



*Figure 17: The in person ongoing project*

**How should the remote ongoing project be structured?**

Employee surveys show that 90% of people think they are more productive at home and 55% say that they are also working more hours at home (Owl Labs, 2021). This indicates that especially when there is a lot of heads down work to do, the project teams will work well and be able to focus on delivery. However, they need to ensure to regularly check in with the client and make conscious decisions to grow closer to the client, for example by leaving room for small talk and by turning on their cameras when possible.

Considering how people have reported feeling overwhelmed from the extra work loads and being online 24/7, the meeting cadence between project team and client should be regularly scheduled but also during hours that work best for the client. It is recommended to ask the client about their habits, for example, whether they are morning or afternoon people. Do they prefer to be in the details and meet daily for a short period of time or would a meeting every other day for 30min be better, with the option to have longer workshops on demand? The next item is to find a working atmosphere that works. Some interviewees recommend leaving the camera off during the regular syncs but then turning it on for special meetings (Appendix B13: Manager 3) like meeting a new team member, brainstorming sessions and in conflict situations. Further, to reduce those feelings of being overwhelmed, the consultants should be intentional about the meetings they schedule and have clear outcomes in mind before adding to the client's meeting calendar.

Additionally, to bring more fun back into the workplace, the consultants should quickly create an understanding of their client's interest in gamification and include interactive activities, like whiteboarding or virtual realities, to release endorphins and create an enjoyable but also creative working environment (Charney, 2021).

In summary, the consultants need to ensure their client bonds with them successfully through creating more closeness by reading each other's facial and body language during certain meetings

that include the camera. This can be supported for clients with advanced technology skills by also including their interests in modern technology by creating joint working sessions and virtual meeting rooms.

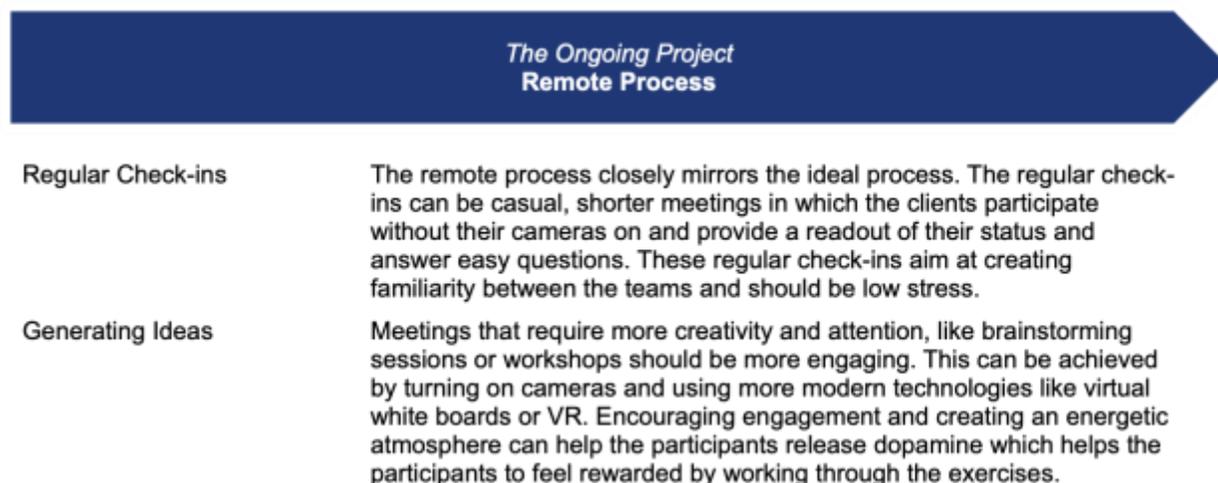


Figure 18: The remote ongoing project

## 5.5 The Milestones and Project End



Figure 19: The milestones

### What are the milestones and the project end?

The fifth step is the milestones and the end of the project. The milestones are the ongoing engagement between the project team of consultants and the client. The Cambridge dictionary defines milestones as “an important event in the development or history of something or in someone’s life” (Cambridge Dictionary, n.d.). Following the definition, a milestone is what the project team and client define it as, it could be a regular point in time, e.g., every quarter, or event

driven e.g., the end of a defined project phase like the deployment. The one well defined milestone is the end of the project, when the contract ends, the deliverables are done, and the project team will either get extended or rolled off.

### **Why are the milestones and project end relevant?**

The milestones and project end are relevant because they offer themselves as scheduled opportunities for reflection on the direction and progress of the project. Usually, the milestone meetings will include the leadership teams as defined in the project governance. So far in the execution, the focus has been on two leadership levels, the project leads and project team from the client and the consulting site. Larger projects may have multiple workstream leads reporting into the main project lead. For the milestones, the reporting includes the corporate governance, defined as “the way in which a company is managed by the people who are working at the highest level in it” (Cambridge Dictionary, n.d.). Therefore, leaders on the client site as well as the consulting site will now be included in the reporting.

### **How should the ideal milestone and project end be structured?**

Having a readout for a milestone or project conclusion begins with the preparation for it. This step can be done remotely and entails collecting all the core information required to create the meeting agenda:

- When is the meeting?
- Who is attending?
- How long is it?
- Where is it?

- What is the agenda?

The when should at least be a roughly defined point in time since the project signing. The exact time and date can either be defined in the kickoff and set up in a regular cadence or scheduled around two weeks in advance of the milestone.

The list of attendees will strongly vary based on the level or seniority of the client and the impact on the business. Usually, the meeting should be attended by people senior to the project teams and experts in the field to provide guidance.

The length of the meeting depends on how established the project and the steering committee content is, as well as the level of seniority of the participants. For example, a high visibility project may have a biweekly 1-hour meeting for the first six months to get established and then move to a meeting once a month for 30 minutes.

Since it is a senior meeting, the structure tends to be more formal, usually held in a conference room but remote video calls are also very much possible and used for regular milestone meetings.

The in person aspect should be continued to be carried forward, however it is possible to make the conference room feeling become slightly more cooperative. While all attendees should have a clear line of sight to the presentation or other material being presented, the seating order can influence how close the consultants are to certain clients as well as how they are perceived by them (e.g., is the lead sitting in a centered seat or close to the door to get out quickly?). While a circular table arrangement promotes cooperation the most, it may not be the most functional when including presentations. The rectangular seating arrangement can help promote eye contact.

The final outstanding item is the agenda. A lot of regular steering committee meetings will have a recurring set of topics and slides to go through. Milestone driven presentations based on phases may require varied content be presented, as do final readouts. However, even while varying in

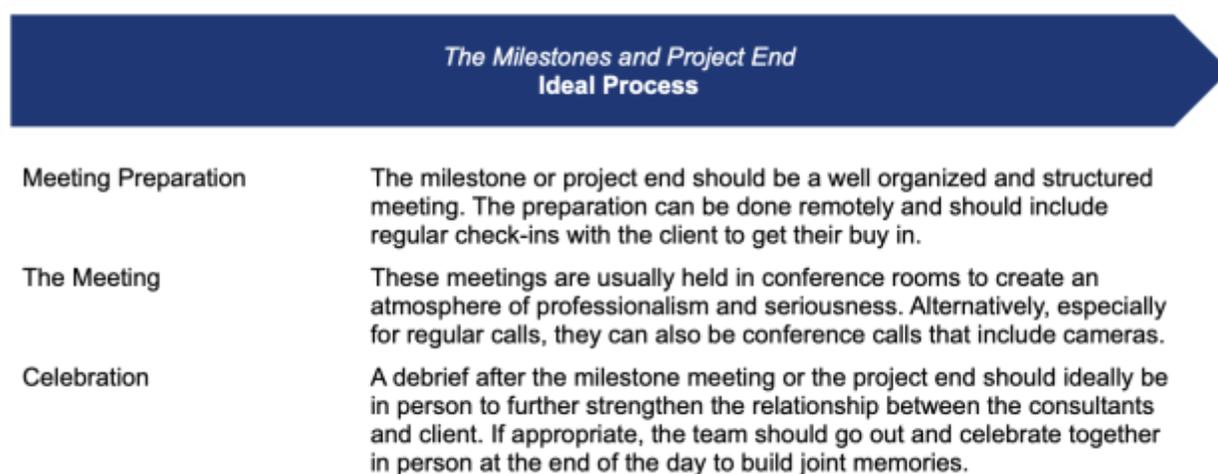
content, all projects have constraints that should be addressed in the governance. The classical three constraints are time, scope, and cost (Benz, 2022). However, recent studies show that three additional constraints should be added to the list; quality, risk, and resources (Benz, 2022). Regardless of the number of subsections, like different project workstreams, the governance readout should entail an overview of these six constraints for the overall project. A classical approach is the traffic light where the different phases or tasks would be marked as either green, orange or red. In order to build trust with the leadership, a transparent relationship is important, not just the perceived pressure that all aspects must be green. The project team should use the benefit of being in person to build the rapport to have honest conversations and ask for advice or alternatively let their client present and support their relationship with their leadership. For example, an orange status should ideally come with a resolution plan to avoid it becoming a risk and red in status. However, the project team must leave enough space for the audience to react to it, ask questions and if possible, even weigh out different options in a controlled brainstorming session. People show higher buy-in when they feel like they contributed to an idea and take ownership (Appendix B25: Director 5).

After the governance meeting, the project team as well as the client team should debrief to be aligned, and depending on how the meeting went, also use this time to build the relationship and either celebrate or be able to let out frustration together. Experiencing milestones can be a very good relationship builder, as it is a shared experience and shows how much leadership and responsibility the respective parties are taking.

Especially if this milestone is the end of the project, it is important to celebrate with the client and ideally the project team and the governance leadership to remember the good working relationship for future engagements. Celebrating and laughing together can release endorphins, the hormones

that relieve stress and anxiety, causing the side effect that people form a stronger bond with those they can celebrate and laugh with (Manninen, et al., 2017).

In summary, the milestones are an opportunity to read out the project status and updates to higher level executives that are part of the governance. These meetings need to be carefully prepared for, as they tend to be more formal in nature. However, instead of trying to upsell the status of the projects, the teams should be transparent about issues and utilize the experience of the group to agree on resolution plans or follow-on work, if needed.



*Figure 20: The ideal milestones and project end*

### **How should the in person milestones be structured?**

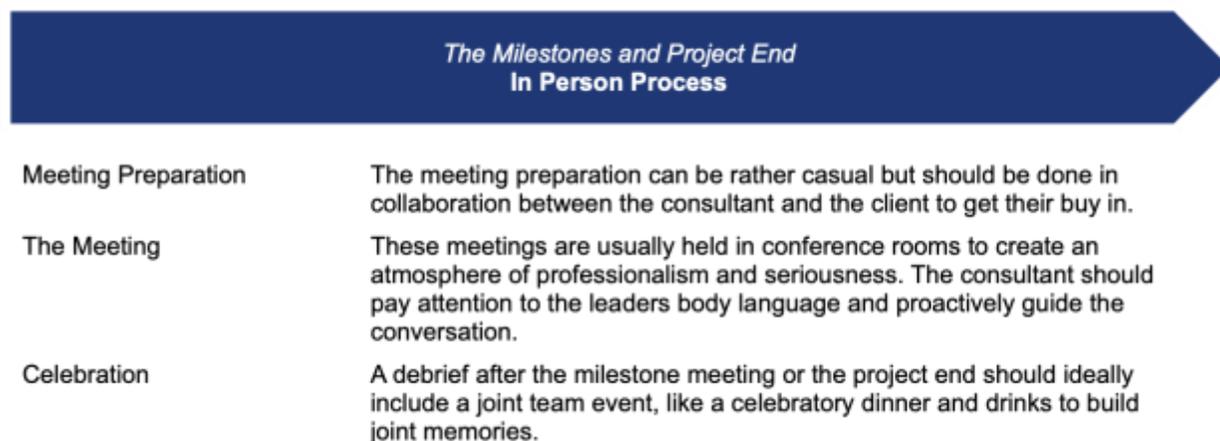
The milestone conversations were traditionally done in person, with the interviewees describing the change as: “The last two RFPs I just had, we did orals remotely via video conference and it's a very different dynamic. You can't see body language, you can't see how people are reacting as well. It's a very different experience and there's a reason why those were in person, traditionally. So yeah, I never really thought about the end of a project. For me, I think it's more not necessarily about the readout and the project, but more of a milestone celebration. Those would typically be in person with the client, especially if it was a big program and we finally crossed the finish line.

You want to celebrate that moment with your client. And we would usually do that as some sort of event, and I think that's very important to maintain. Again, going back to relationship and building a longer lasting relationship with the client and it doesn't just feel transactional, here's the program, we finished it. Thank you for your money. Have a good day. We ultimately want to create a relationship that is more valuable to us in the long run. And so maybe the readout can be in person or doesn't need to be in person, but historically we've always celebrated those moments” (Appendix B24: Director 4). The in person milestones should be conducted and celebrated like mentioned above. The core difference is going to be in the preparation, that was done remotely in the previous section.

After the agenda and parameters are set, it could be worth spending time mentoring the client about how to present it and prepare them in person. At this point, the project team should have an understanding of the leadership culture in the company and how to best support the client in who should present (client or consultant) and if the client needs additional coaching to present in front of their leadership.

The project team will still be responsible for preparing the material but should have scheduled times to walk the client through it, already in person. The atmosphere during these preparation sessions is often more relaxed, depending on who from the client is presenting, they may need to only be in the client’s office. Should that be the case, the consulting team needs to avoid overwhelming the client and should be careful about how many people they involve in the preparation to avoid making the client feel like they must also “bring an army” to the milestone readouts.

In summary, the biggest benefit to having the milestone presentation in person is the face time with higher level executives for the client and the project team, in addition to the opportunity to celebrate with the client after the presentation and deepen that relationship.



*Figure 21: The in person milestones and project end*

### **How should the remote milestones be structured?**

The milestone or end of project readout can strongly benefit from in person interactions in that they increase trust and bonding and benefit the client by providing facetime with their leadership. Conducting these sessions remotely will therefore require a conscious framing of the environment. The preparation will be conducted through preparation calls, as mentioned above. For the actual session, the framework and atmosphere should be set based on the level of importance of the project and leadership involved. “I think in person's always good. I mean, especially for the final presentation, that's important, unless the final presentation is just a formality, like you have already aligned with everyone before the call. I think it depends on who are in audience for your final presentation and what kind of impact that you're trying to create. If it's a situation like you already align with everybody and everyone already knows what you're going to talk about and it's pure formality then maybe a video call is good enough, but then if you're teaching this to a CFO or a

CEO, then you should be in person because that's important. It really depends on like what the scenario is” (Appendix B11: Manager 1). As mentioned, if everyone is aligned and there are either no areas at risk in the project or the final readout is a formality, the remote call will be straight forward. The question is what it should look like if there are areas of concern or for discussion.

In these situations, the call should be conducted with camera to avoid distraction. Additionally, the agenda must ensure enough space for discussion around items of concern without forcing unnecessary attention to them. A simple yet impactful solution would be to present a section of the content and then have a clearly formulated question in writing on the screen that has been agreed on before. E.g., “How have XX risks been handled in previous projects” and leaving the leadership room to respond while also being prepared with solution plans from the project team. Depending on the personality of the leadership, some will be more engaging while others are expecting more of a readout. The questions and number of them should be tailored accordingly. Using technology solutions like whiteboards could also increase flexibility but are more commonly used just in working sessions, not readouts.

In summary, a remote milestone presentation saves time and logistical effort and can take some pressure off the presentation, especially when treated more as a formality. However, the benefits of being able to read the body language during the meeting and celebrating with the client after a successful meeting are desirable.

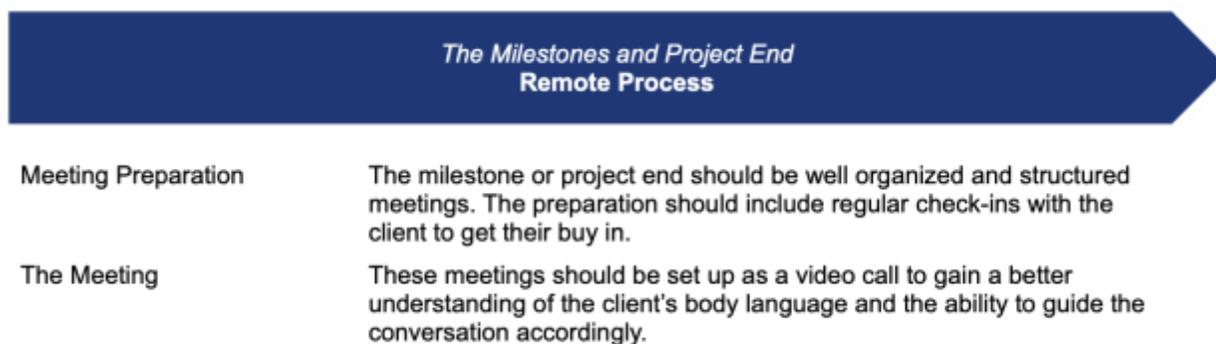


Figure 22: The remote milestones and project end

## 5.6 The Follow-up Conversations



Figure 23: The follow-up conversations

### What are the follow-up conversations?

The follow-up conversations are a sales stage, often even before the current project comes to a close. The project team and their leadership will get together to find follow-on activities to pitch to the client to continue the work. This is a different phase of selling than the initial phase since the team is already very familiar with the buyers and the people able to influence the buyers.

### Why are the follow-up conversations relevant?

The follow-up conversations drastically cut the sales cost as the lead is already warm. It has previously been said that it costs five times more to gain a new customer than to keep one (Morgan, 2019). Morgan (2019) additionally mentions that a lot of successful companies look at the customer's lifetime value (CLV). Looking at the CLV can help consulting firms determine when

to start and how much to invest to continue the project and relationship. For example, a project with a new leader in a company that is already a loyal client to the consulting firm is probably worth keeping happy, as is a new client in a fast-growing industry. However, a small account with very little cash and history of hiring consulting firms may not be worth investing in as much.

### **How should the ideal milestone and project end be structured?**

For the ideal process with a high CLV, the follow-up conversation would be in person meetings over coffee and dinner. These conversations usually start midway to  $\frac{3}{4}$  through the entire project timeline (Appendix B13: Manager 3, Appendix B22: Director 2). Some projects may naturally have a second phase, e.g., creating a marketing strategy in phase 1 and implementing it in phase 2. For other projects, or even when there is a higher likelihood that the client would do the implementation themselves, it's recommended to keep a backlog of follow-on activities. The beauty in collecting them during the project is to avoid forgetting certain items for feedback and to be able to use it in the follow-on conversations. One interviewee even mentions adding the items from the backlog to the final readout deck by creating a roadmap that makes it easy to show the client what was accomplished in the current project and what would be the next items (Appendix B14: Manager 4).

The structure of the follow-on conversations is its own process. "You're not there to continue to sell work and so you have to be a little bit judicious about how you approach that. The best way is clearly articulating the value of the work that you've performed and building sufficient trust that, should they want to move forward, that it becomes sort of their idea to do that" (Appendix B21: Director 1). As quoted, consulting leadership often gets more involved in these conversations than in the day-to-day work. Ideally the follow-on conversations start by mentioning the additional

phases during the regular syncs, followed by leadership visits to the site to talk to the client over coffee about how they are feeling. The situations should be natural and without any pressure, which is why coffees or water tank talks are preferred. When it is getting closer to the project being 80% done, the leadership will start introducing the price and draft a proposal (Appendix B22: Director 2). As the conversations become more committing, so should the setting. It could be worth taking the client out for a drink or even dinner to truly listen to their reservations but also to take this relationship to a new level. The best relationships are when the consultants understand the underlying reasons and especially motivators for the clients. For example, find out what the client needs for their next promotion or what personally motivated them to take the job in the first place and try to tailor the work more towards these goals. Having worked together, the client now understands the quality of the project team, so the sales pitch needs to move towards more intrinsic motivations. This can better be accomplished by creating relaxing, yet private environments, like visiting a bar or coffee shop versus a conference room.

The goal is for the contract to get signed so the existing project team can stay on. One of the interviewed directors highlights the need to create urgency in order to avoid a time gap between finishing one phase and starting another (Appendix B22: Director 2). Should the contract not already be signed, the project team can leave time in the agenda during the final readout to discuss this. This will increase the seriousness of the situation with all the leadership being in the same room and having a conference room setting.

What these interviewees described is a way to create a sense of urgency and scarcity that other researchers support (Hall, 2018). The interviewees first build on the trust they built with the team, then make the offer relevant by making the client feel like it is their own idea, improve the value

by talking about how the next step can enhance the project, and finally nudge the client by talking about restaffing resources.

In summary, the follow-on discussions need to be sensitive conversations that scale in setting and frequency to make the client feel like they are leading this new sales phase. The conversations start in more casual setting and by the consultants listening to the clients for their thoughts and needs. After a few weeks, the consultant should increase the urgency to decide on a follow-on conversation to get an extension of second phase signed.

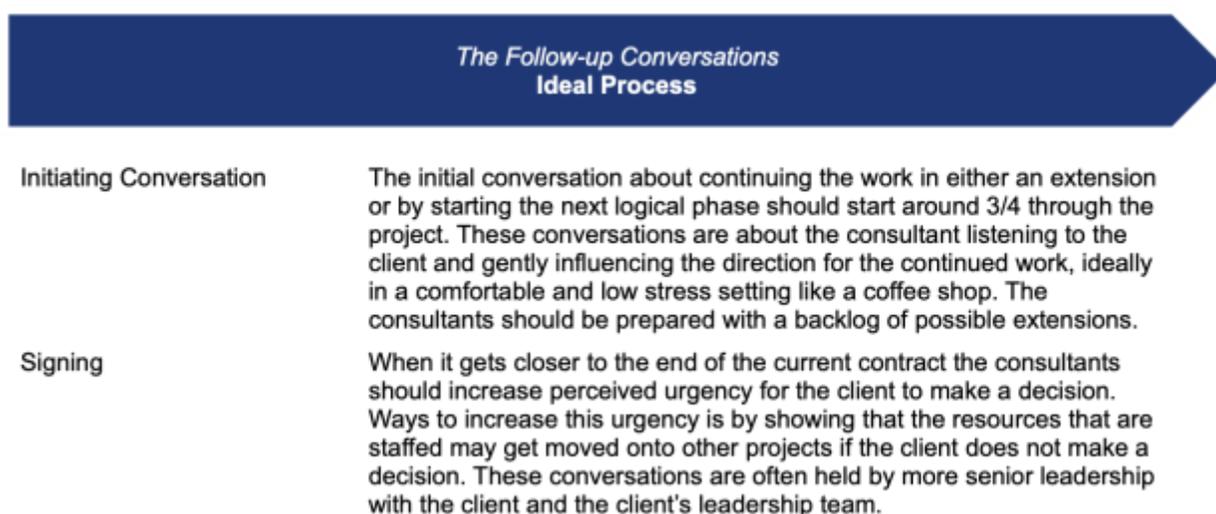


Figure 24: The ideal follow-up conversations

### **How should the in person follow-up conversations be structured?**

The previously described process is truly in person, other than potential preparation calls between the consulting leadership with the project team. Should that not be possible or may not be worth the investment from the consulting firm in time and logistics, having remote check-in calls or less formal interactions like instant messages and text messages may be a compromise. Should a follow-on be truly unlikely, consultants should determine when to move onto the next step, the

relationship management, to keep the relationship going instead of forcing a sale that may be too intrusive.

In summary, the consultant should take the time to determine the interest of the client for continued work and not harm the relationship by selling a deal that the client is not interested in.

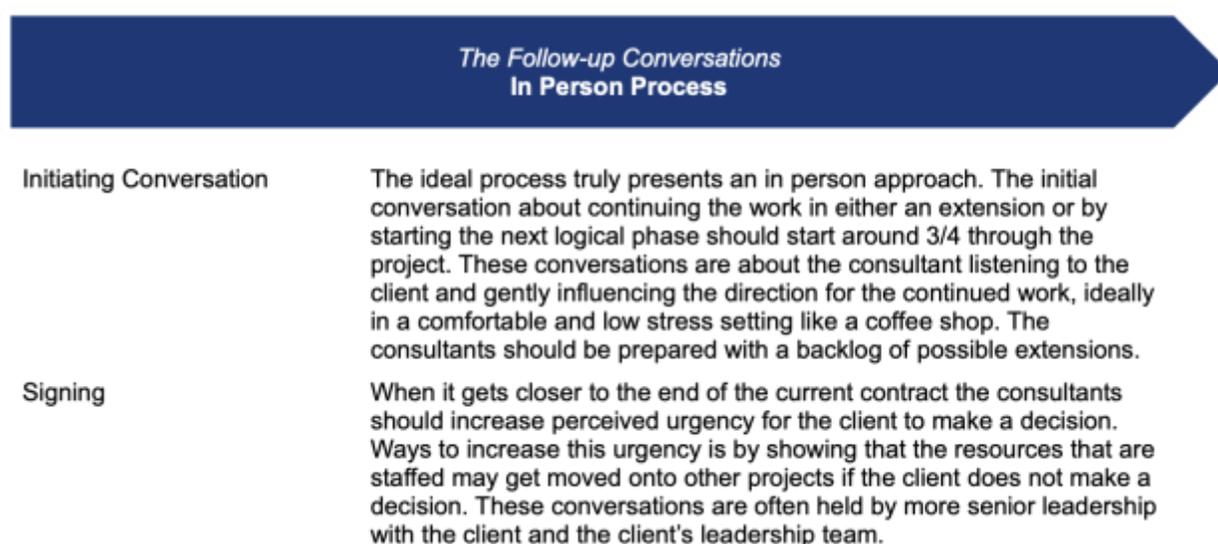


Figure 25: The in person follow-up conversations

### **How should the remote follow-up conversations be structured?**

The project continuation conversations should be approached with extra care because of the lack of in person interaction. It may be advantageous to start initiating the topic in an informal setting by mentioning follow-on activities in the regular syncs or by staying on a call just with the main stakeholder and driving the conversation towards upcoming activities. Once the client shows interest, new calls should be scheduled specifically to address the follow-on activities. Ideally, the consultants come prepared with a list of upcoming items to talk through. Once they are filtered down to the ones the client would most like to have support in, the consultants can bring in their leadership and invite the client's leadership to start the sales conversation.

The benefit of remote conversations is the easy use of tools. To win enough engagement from the client in this phase, it is recommended to use virtual whiteboards like Miro so the client can also help prioritize what they view as important. The interaction boosts the client's buy in as they feel engaged and, especially when adding game-like features to the work, the client releases dopamine. Dopamine makes people happier and more satisfied with the work (Charney, 2021) making the sales conversation more satisfying instead of a drain.

In summary, the consultants should make sure the sale is an enjoyable experience and not overwhelm them with very strong sales techniques that push them into a corner too early. These techniques should only be included when creating the urgency to sign a follow-on contract in time to keep the project team involved without a gap.

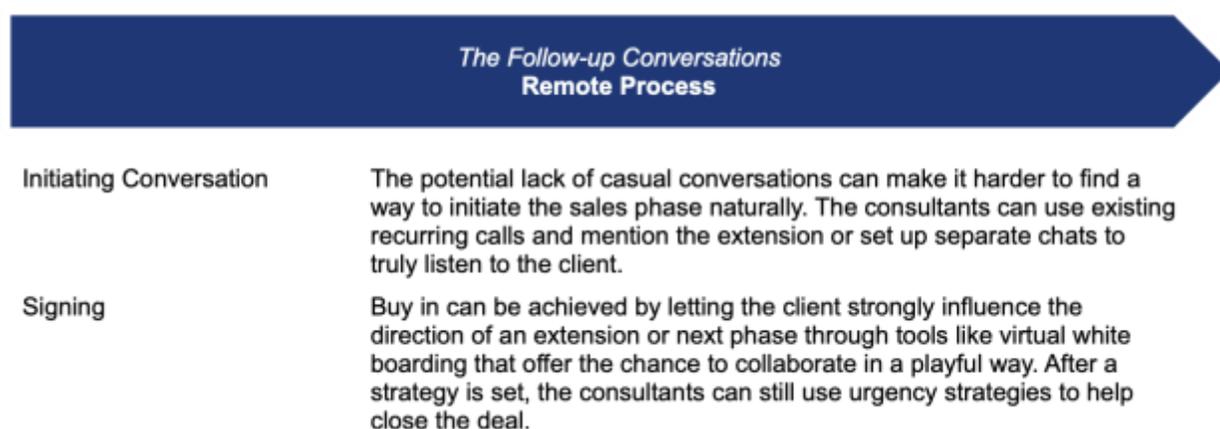


Figure 26: The remote follow-up conversations

## 5.7 The Relationship Management



Figure 27: The relationship management

**What is the relationship management?**

The relationship management refers to the ongoing relationship that the consultants are building with their clients or “the supervision and maintenance of relationships between a company and its external partners, especially its clients” (Oxford Dictionary, n.d.) The client relationships can be managed during project engagements as well as after these or in sales discussions about new projects.

**Why is relationship management relevant?**

As mentioned above, the cost of retaining clients is often significantly lower than to acquire new ones (Morgan, 2019). Additionally, in the consulting industry, the trust that an organization or specific people within it have in their business partners can drastically influence the level or seniority of the projects they are entrusted with. This is a different level of trust than mentioned earlier, the level of trust is elevated from a specific project team to hopefully the company as a whole. “It is important to have good relations with people; by "good," we mean "loyal" and relationships built on trust. If your boss trusts you, and your colleagues have good relationships with you, only then will they speak well about you with others. Such conversations open a lot of career opportunities, too” (Tait, 2020). Industry relations therefore are important to grow the existing client accounts as well as to establish and keep a positive reputation in the industry.

**How should the ideal relationship management be structured?**

Identifying the ideal relationship management is very strongly dependent on the personality of the person or company culture the consultant is trying to build a relationship with. To take a step back, relationship management, “... is mostly about how well you can influence people. A great

influencer has amazing interpersonal skills, and interpersonal skills can be learned and taught” (Tait, 2020). Considering that relationship management varies strongly between personality types, and ensuring that the relationship is valuable, an ideal process can be tailored in a matrix.

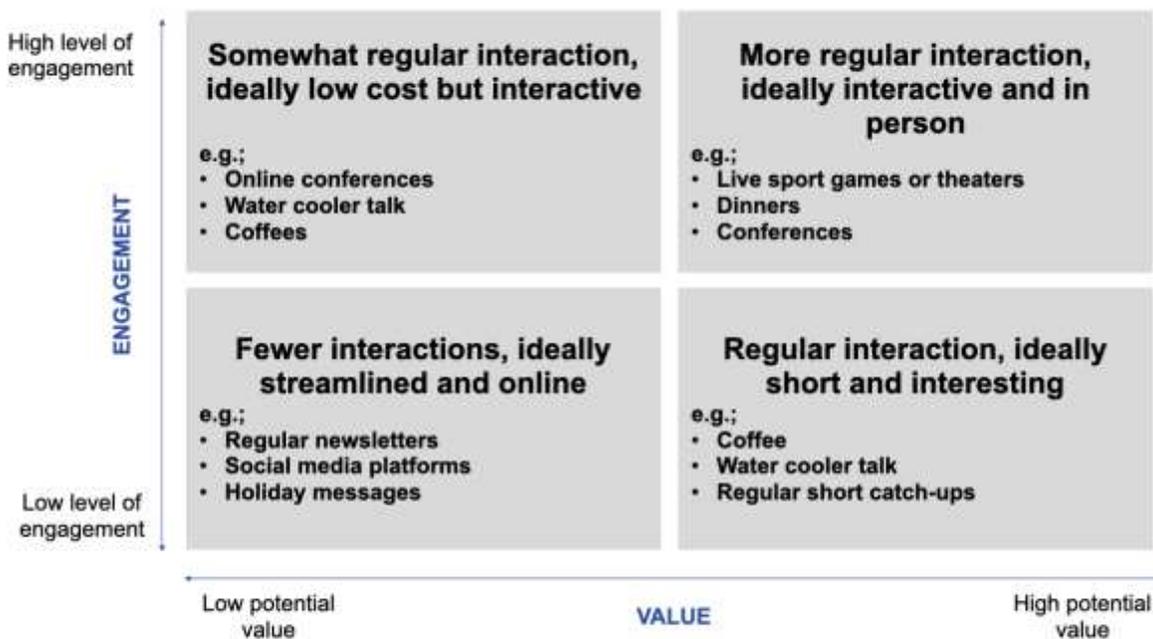


Figure 28: The engagement and value matrix

The vertical axis “engagement” shows the level of interaction the person appreciates, do they value quality time and joint experiences, or would they prefer to just be informed online in an informal manner that is not asking for much commitment?

The horizontal axis “value” shows the value of the relationship. As previously described, the value of a relationship can be drastically different based on the customer’s lifetime value (CLV) (Morgan, 2019).

In summary, the consultants need to carefully assess the relationship and the value of the relationship in order to identify what style of interaction may be most useful in the ongoing

relationship management. Then relationship management activities can be selected as suggested in the engagement and value matrix above.

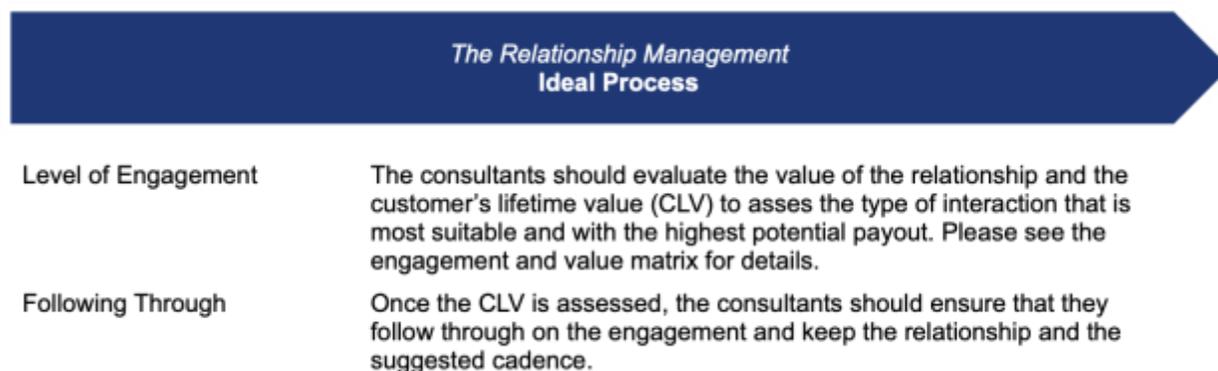


Figure 29: The ideal relationship management

### **How should the in person relationship management be structured?**

The in person relationship management is strongly dependent on logistics and if the team has overlapping relationships, e.g., will the consultant see them at industry events, do they even live in the same city?

A person that is close by or working at a larger account that the consultant visits regularly provides a great opportunity to keep regular conversations going that are conversational, like water cooler talks and coffee breaks. High value clients can also be invited to more active engagements such as organized company events to go to games and plays. Having the regular conversation can also ensure the consultant is aware of their clients ups and downs and is there either to support or even more to celebrate the wins, as mentioned above, to release endorphins together and improve the bond (Manninen, et al., 2017).

In summary, the in person relationship still needs to include an evaluation of the personality as well as the value of the relationship, but can vary from casual coffee meet ups to more engaged

events. The key takeaway should be the intention to build memories with the other person and enhance the bond through regular meetings and joint celebrations.

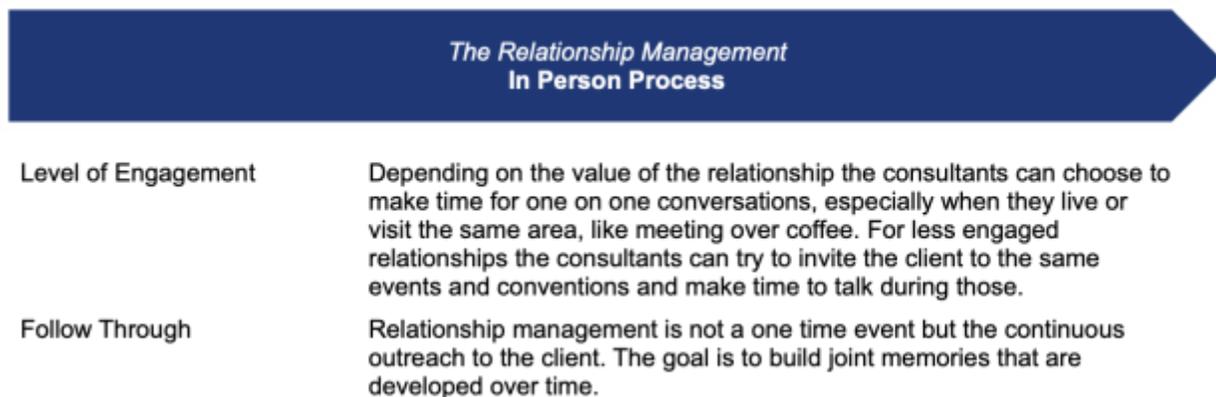


Figure 30: The in person relationship management

### **How should remote relationship management be structured?**

Companies with a large online presence, especially in retail, have spent a lot of R&D on their customer relationship management (CRM) tools and strategies. Companies like Amazon have figured out how to keep the relationship with their customers and even personalize the communications based on their customers' shopping history. These online reach outs are strongly based on advances in technology (Marks, 2022). For lower value customers, using these strategies could be great to stay in touch. The key is to identify what the consulting firm is providing to the customer, most likely some sort of knowledge. The communications therefore should be tailored around this product. Using social media, like LinkedIn or regular email messages and invitations to online conferences and knowledge exchanges can keep these relationships going.

For more valuable customers, just going back to how people communicate with friends, by sending messages and articles when they think of them and having regular conversations that are comfortable and quick, e.g., a quick 15min call after a big event for the client, can strengthen the relationship.

In summary, it is easier in remote communication to reach a wider group of people by leveraging different technologies from emails to social media posts. For higher value relationships, more effort needs to be taken to enable the other person to still open up and increase the bond without creating the feeling of being a burden or another meeting in their calendar.

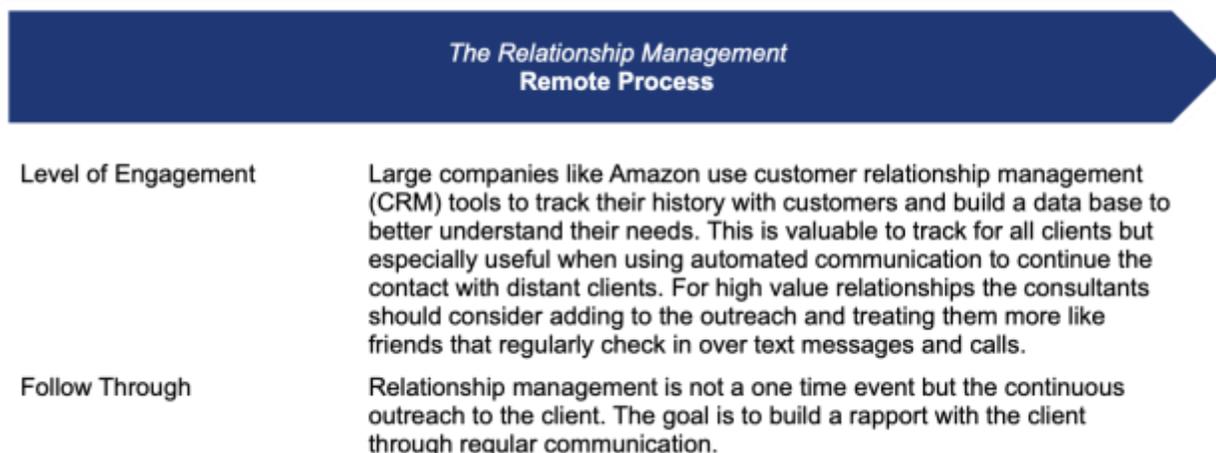


Figure 31: The remote relationship management

## 5.8 The Conflict Management



Figure 32: The conflict management

### What is the conflict management?

The conflict management refers to any existing tension in the project. The word conflict comes from the Latin origin of the ongoing relationship that the consultants are building with their clients of “con” meaning together and “fligere” to strike (Oxford Dictionary, n.d.). As the word origin suggests, there are multiple ways in which conflict can arise, the project team may strike together

against an outside influence or build their own conflicting views. Conflicts can arise at any point in time during the process which is why it's underlying the chronological order of the process established in this paper.

### **Why is conflict management relevant?**

Conflicts can arise at any point in time, but not all disagreements are conflicts. The escalation between a disagreement and a conflict often stems from misunderstanding or unresolved conversations. Proactive conflict management and transparent communications can resolve a lot of issues before they become too large to handle.

Conflict has positive and negative aspects, it can lead to “absenteeism, lost productivity, and mental health issues” (Benoliel, 2017). At the same time, it is also an opportunity to discover areas for improvement and “can be a motivator that generates new ideas and innovation as well as leads to increased flexibility and a better understanding of working relationships” (Benoliel, 2017). Overall, conflict can stem from three different areas; task conflict, relationship conflict or value conflict (Shonk, 2022). The three categories show the depth of different conflicts from the tasks people get assigned to and expectations they carry to the interpersonal disputes of work styles and behaviors to the deeply rooted values that people carry and may not completely align on.

### **How should the ideal conflict management be structured?**

The initial step is to identify the parties in conflict. This could be the consultant and client, inter-team on either side or the project team (client and consultant) with their leadership. The level of informality between the parties may dictate how the conversations should be structured, but overall, the most important aspect is talking through the items and identifying the root cause. The

following is a breakout of the conflict situation in five common conflict styles and how they are ideally addressed; collaborating, competing, avoiding, accommodating, and compromising styles (Benoliel, 2017).

### **Collaborating**

The collaborating style focuses on finding a solution that both parties benefit from. Especially in relationships that are built or aimed for longevity, this style can be very important. In an ideal situation, the two parties at conflict, possibly with a mediator, get together in person to identify the root causes for their conflict, have an open discussion about it where they truly listen to each other and then leave the meeting with a plan to work together going forward. The setting should make both parties feel safe but also private enough to open up without others being able to hear, for example a private smaller conference room.

### **Competing**

The competing parties “are assertive and uncooperative and willing to pursue one’s own concerns at another person’s expense” (Benoliel, 2017). For a consulting firm, this style can be used when competing with another firm for a client but should not be used towards the client. Since there is no focus on building a relationship, this style does not require in person interaction, if they are even connecting at all about the issue.

### **Avoiding**

Avoiding the conflict, as the name implies, is to ignore the issue. This tactic should only be used for smaller issues, like working styles with a client that will not last very long. However, especially

if these are just small corrections, the consultants should weigh the benefits of telling the client, especially as the relationship gets stronger, it could be an easy resolution to just talk about. The timing of these conversations may be more important than the setting as these are ideally treated as small informal favors that can be addressed either through an online meeting or in an in person meeting. In some instances, they could even be addressed in writing, e.g., mentioning in an email that it may be easier to reach someone on their work phone over their private phone, but these should be carefully considered to not offend anyone.

### **Accommodating**

The accommodating style is focused on pleasing the other person. This can be used to help further develop the relationship with, for example, the client or boss. A simple example is to let the other person pick the lunch place or the layout of a slide. Since there is no confrontation about the conflict, these situations can appear in both in person and remote settings.

### **Compromising**

“This style aims to find an expedient, mutually acceptable solution that partially satisfies both parties in the conflict while maintaining some assertiveness and cooperativeness” (Benoliel, 2017). This style is ideally used in in person workshops where the focus is on cooperation in the situation but there is also a time limit in the situation that requires a certain degree of “giving in”. Topics can be tabled for later as a compromise or are kept high-level for further defining in follow-on conversations.

In summary, the core of conflict management is understanding the deeper underlying issue and keeping a level head, without taking it too personal, to constructively move past the issue instead of escalating it.

There are situations that are more complex where it is advised to include experienced leadership personnel or even a mediator.

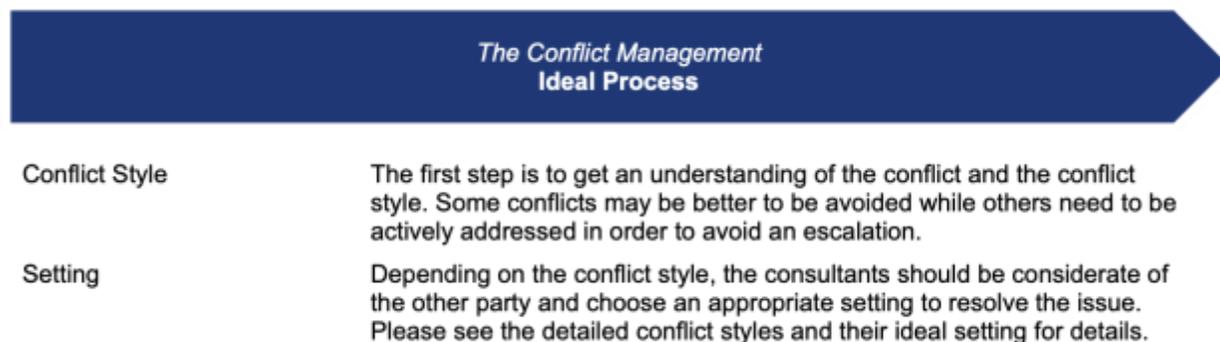


Figure 33: The ideal conflict management

### How should the in person conflict management be structured?

While in person offers a lot of opportunities for face-to-face conversations, it remains important to identify the best conflict style. Sometimes, the best approach is to take a step back, identify the core issue and create a plan. In doing so, one will likely identify some conflicts that can simply be avoided.

Additionally, setting the correct atmosphere for these conversations is important. Overwhelming someone with a private conversation in the coffee kitchen may not be the best timing or placement. So, the second step is to identify if this is a rather small conversation and favor that can be asked in a casual conversation. Otherwise, it may require scheduled time, a little bit of a heads up so the other person doesn't feel cornered and a quiet location. The third option for larger conflicts is an actual workshop with senior leadership that is usually held in a conference room.

In summary, the in person conflict resolution offers the benefit of reading how a person reacts through their body language in addition to their verbal response. This allows the consultant to emphasize, explain or back off from the conflict easier before escalating it.

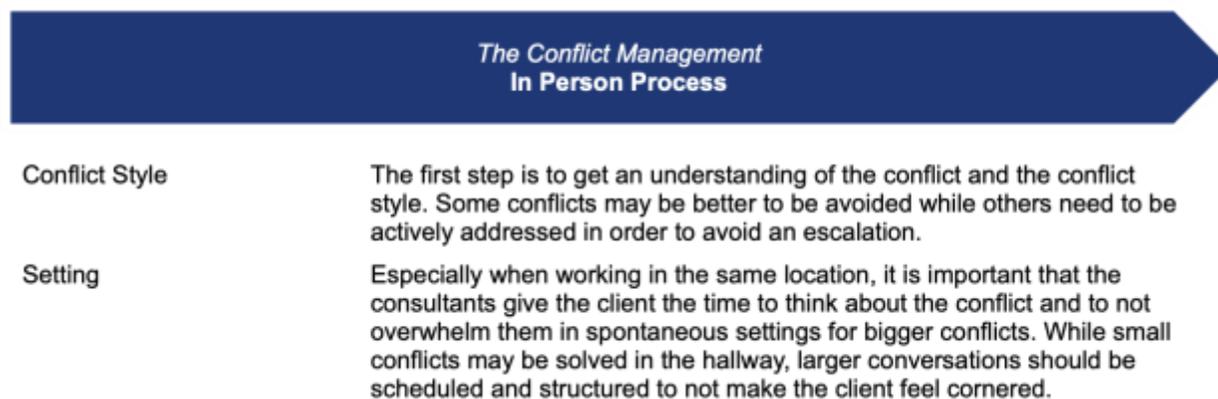


Figure 34: The in person conflict management

### **How should remote conflict management be structured?**

Remote conflict management requires good timing and usage of the correct technology. Generally, more causal conflicts can leverage more casual methods of communication with more severe topics requiring more formal channels. Small favors can be communicated via instant messages or in regular calls. Slightly more serious topics should utilize scheduled meetings and include video feeds to better read the other person's true feelings. The most severe topics should be either addressed in video workshops, if they just require communications, or in writing (e.g., pdfs, documents, or emails) in cases like contract disagreements to create a written record.

In summary, written conversation can lead to different interpretations and unintended escalations, phone and video calls are therefore generally preferable. The main exception to this rule is in regard to any potential legal obligations, in order to build an appropriate record.

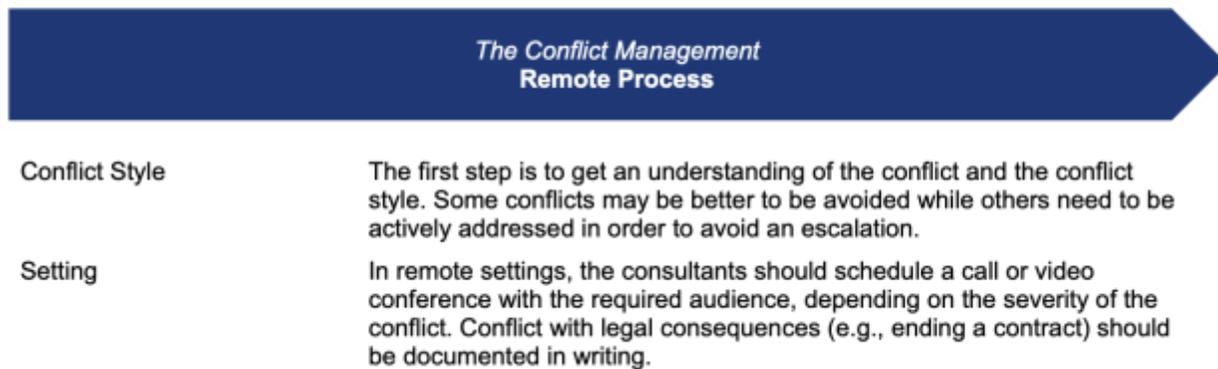


Figure 35: The remote conflict management

## 5.9 The Process

A third iteration of the process, as shown in the picture below, highlights the fact that not all process steps are the same length and that some steps are repeated more often than others.



Figure 36: The phased process

The process contains eight steps, but only four distinct phases, the fostering of relationships, sales, milestone communication and the working relationship in addition to the constantly ongoing potential conflict management. As a result, consultants are recommended to focus on building expertise across the four phases.

When tying this back to the demographics of the interviews, the analysts tend to have the most expertise in the working relationships as they are getting exposed to their first few projects.

As consultants, the interviewees are taking on more responsibilities for deliverables which become especially important in kick-off preparations and milestone conversations.

As managers, the interviewees hold stronger and stronger relationships with clients, are managing their teams and should start shifting towards learning more sales skills.

Senior Managers are strongly focused on sales and the relationship fostering of their existing clients to expand their sales.

Managing Directors focus especially on relationship management to keep their current clients, but also to expand their portfolios and reach.

The irony in this breakout is how the consulting career starts in the middle of the process and slowly expands to both ends of the process. When looking at the first analysis of the interviewees (Figure 1) the more junior resources tend to have stronger opinions formed around the work engagement and more experience with remote engagements through their school and early working engagements. Consultants and Managers are shifting more towards owning deliverables like kick-off meetings and milestone presentations. Managers and Senior Managers are focused on the client delivery of projects but also are engaged in sales conversations for proposals and follow-on contracts. Directors then oversee the process from the beginning to end and tend to share stronger opinions around key meetings, relationship management and escalations. This generalization is not intended to exclude certain levels from their responsibilities across the entire process but shows a shift in how their responsibilities move across the process with experience.

## 6. Conclusion

This research shows the eight most common steps consultants engage in with their clients, and has identified the most ideal response to a situation, and two other options for completely in person or completely remote client work. Commonalities across the process include that consultants should spend the time to identify their clients' preferred ways of communicating to reduce possible tensions and enable the most direct means of creating consent and understanding. In general, consultants need to create trustworthy relationships to reduce the stress their clients experience and seek to minimize cortisol release. Reducing the amount of cortisol relaxes the client and allows for more creative conversations and solutioning. Afterwards, the consultants should increase the level of engagement and satisfaction the client experiences by allowing for the release of dopamine. These hormones can be released through interactive working sessions and enjoyable cooperation. Finally, the consultants should create a relaxed environment to support the release of endorphins. The endorphins help clarify the solution the consultants are working on with the client and are released in happy situations like shared celebrations of milestones. Overall, there are multiple ways to reach the level of cooperation required to successfully complete a project and cooperate with the client to shape customized ideas that fit their business needs, however, in person interactions and remote working settings require different tools to reach that same goal.

This research provides an example for consulting engagements, further research would need to be conducted to verify that these hypotheses hold true within one specific company or one specific project team. Additionally, advances in technology may reduce the discrepancies people experience from being physically removed from their conversation partners as artificial and virtual realities become better and can simulate in person interactions more realistically in the future.

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# Appendix

## Appendix A: Questionnaire

### Appendix A: Primary data collection method - Questionnaire

| Category     | Question   |
|--------------|--|
| Introduction | <p>(Greetings)</p> <p>I am conducting interviews for my DBA research and would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30min. Do you consent to be recorded?</p> <p>The transcript will be made anonymous and attached to the final project, is that okay with you?</p>  |
| Experience   | <p>First, I would like to hear about your experience in the workplace.</p> <p>How long have you worked in Consulting?</p> <p>How many years have you worked in person and how many remote?</p> <p>Have you detected any changes in yourself or new habits you developed primarily working from home?</p> <p>What is your preferred way of engaging with coworkers? (remote, in person, hybrid)</p> <p>What is your preferred way of engaging with clients? (remote, in person, hybrid)</p> |

|           |   |
|-----------|---|
| Scenarios | <p>Next, I will walk you through 7 different scenarios and would like to hear about how you would respond to the situation.</p> <p>Scenario 1: You're meeting a potential client and would like to explore if there is an opportunity for a new project. Who is your client stakeholder (level of seniority) and how would you engage them?</p> <p>Scenario 2: You're working on a proposal. Who is your target audience and what do you do to successfully close the deal?</p> <p>Scenario 3: You are kicking off a new project. Who is attending the kick-off and how would you like to structure the meeting?</p> <p>Scenario 4: During an active project, how do you prefer to engage with your client? Does it vary by stakeholder? (location, cadence)</p> <p>Scenario 5: You're at an important milestone during the engagement or at the end of one. How would you like to present your finding to your client and who is attending the meeting?</p> <p>Scenario 6: You believe there is potential for a follow-up project. How do you like to communicate that with your client? If they are different people, how do you communicate with your clients versus the person giving the final sign off?</p> <p>Scenario 7: Outside of engagements, how do you foster existing client relationships? (Does it vary by level of seniority or how long you've known the client?)</p> |
|-----------|---|

|                                 |   |
|---------------------------------|---|
|                                 | <p>Are there other relevant situations you encounter with clients that I did not touch on?</p>  |
| <p>In Person vs Remote Work</p> | <p>We will now shift focus and talk about your opinion on in person versus remote work.</p> <p><b>In person work:</b></p> <p>Briefly describe how you like to structure in person engagements?<br/>(Mon – Thu, weekly travel, dinners, special activities?)</p> <p>Do you believe that there are people that especially benefit from in person work? Who?</p> <p>Are there tools, activities or methodologies you particularly like to use in in person engagements?</p> <p><b>Remote work:</b></p> <p>Briefly describe how you like to structure remote engagements?<br/>(Voice only, camera, screen share, interactive?)</p> <p>Do you believe that there are people that especially benefit from remote work? Who?</p> <p>Are there tools, activities or methodologies you particularly like to use in remote engagements?</p> |
| <p>Future of Work</p>           | <p>Next, I would like to hear about your opinion on the future of work.</p> <p>How do you foresee projects to be structured going forward?</p> <p>Personally, what would be your ideal work structure?</p> <p>How should we use our buildings? (Innovation hubs, offices)</p>   |

|            |  |
|------------|--|
|            | <p>How should we continue to strengthen our company culture?<br/>(Region Days, Office Days, Christmas Parties, Gifts)</p>  |
| Final note | <p>Thank you for your patience throughout the interview. I have three final questions for you.</p> <p>What is your number one advice that you'd give a person currently managing a client engagement?</p> <p>What makes a client engagement a success in your opinion?</p> <p>Do you have any last pieces of advice or thoughts you'd like to share?</p> <p>Thank you so much for your time.</p> |

**Appendix B: Interview Transcripts**

**Appendix B1: Analyst 1**

Date:

Speaker 1: I'm conducting these interviews for my DBA research and would like to ask you a few questions about your experience with varying workplace settings, The interview will last about 30 minutes. And do you consent to be recorded?

Speaker 2: Yes, I do.

Speaker 1: And the transcript will be made anonymous and attached to the final project. Is that okay with you as well?

Speaker 2: Sounds good.

Speaker 1: Awesome, thank you. We're first going to talk about your experience. How long have you worked in consulting?

Speaker 2: About a year and a half.

Speaker 1: Perfect. So how many years have you worked in person? How many remote?

Speaker 2: All of the years I've worked have been virtual.

Speaker 1: And have you detected any changes in yourself or any new habits that you've developed since primarily working from home?

Speaker 2: I guess so. I could say that I, I have more time to do not work-related activities after work. I don't spend as much time preparing because I have usually time during the day. I don't have to wake up as early, so there are logistical differences as well.

Speaker 1: Awesome, thank you that's perfect. And then what's your preferred way of engaging with coworkers? Is it remote, in person, on camera, hybrid? Do you have any idea ?

Speaker 2: Preferred would be in person. I think that that's the easiest way to get to know people well, so being virtual kind of limits that a lot.

Speaker 1: And then what about clients? How would you prefer to engage with them?

Speaker 2: Mine's probably in person as well for the same reasons.

Speaker 1: Great, thank you. So this next section are different scenarios, so different situations that we run into with our clients. And so it's seven different ones that I'd like to walk you through. Is that okay?

Speaker 2: Sounds good.

Speaker 1: All right. You are meeting a potential and would like to explore if there's an opportunity for a new project, who is your client stakeholders? So what level of would you be talking to and then how would you engage them?

Speaker 2: I would assume I'm talking to either like a director or VP and I would engage them by having a convincing PowerPoint, as well as having a couple of preparatory materials that they can look through as well to know what our capabilities are.

Speaker 1: Perfect. And then would that be in person or remote?

Speaker 2: This would be ideally in person.

Speaker 1: And then next you're actually working on a proposal. Do you have an idea on what they want, who is your target audience and what do you do to successfully close the deal?

Speaker 2: My target audience would be the client, so those VPs and directors and to close the deal, I would make sure to listen to what the client's needs are and try and meet them as much as possible.

Speaker 1: Thank you. And then number three. So then now you won the project and you're kicking off this new project that you've just sold, who's attending the kickoff? And how would you like to structure the meeting?

Speaker 2: Probably would be the senior members of the client's relationship as well as the senior members, or I guess all of the people who would be working on the project from our end and I can't remember what the second question is.

Speaker 1: And how would you like to structure the meeting?

Speaker 2: So I would give them context, both parties contacts, as to what the deal was about what the contract agreements are and then line up for them what our perceived timeline might be and how we'll check in with each other as we move forward.

Speaker 1: Perfect. And then would you also prefer to have this in person or remote?

Speaker 2: Ideally in person.

Speaker 1: All right and now number four, you're during an active project, how do you prefer to engage with your client and does it vary by stakeholder?

Speaker 2: I prefer to engage virtually if I can, simply because of the logistics. I think having a couple of meetings, maybe like the first, the middle or the last meeting in person is helpful, but I think for most of the work meeting virtually prevents us from spending a lot of time in meetings that we don't necessarily need to have.

Speaker 1: Right. And then do you think it'll change by stakeholder? I know that you were talking about the VPs, but then also the ones that are actually doing the work. Do you think that's a difference?

Speaker 2: So I think the people who do the work, it's more helpful to meet in person just to go over logistics and find details. But in terms of with the client, you might don't necessarily have to meet as much in person.

Speaker 1: Got it. And then I think you already kind of talked about this one, but now you're at an important milestone during the engagement or at the end of it. How would you like to present your findings to your client and then who is attending this meeting?

Speaker 2: I'd like to present it via a PowerPoint format, kind of giving a summary of the work that we've done, where we think we're going, if that's the midpoint or what we think the client will need to do next, if we're at the end. And in terms of attendance, I think senior members of the client would need to be in attendance and for our staff, it probably could be left to just be more senior members on the consulting side of it.

Speaker 1: Got it. And then am I correct that this one would ideally be in person since that's what it sounded like?

Speaker 2: Yeah.

Speaker 1: Okay, perfect. And then we are at number six, you believe there is potential for a follow on project. How would you like to communicate that with your client, if they are different people, how do you communicate with your clients versus the person giving the final sign off?

Speaker 2: I would try and communicate with that during that final presentation that we have and give some opportunities for them to maybe include of potential clients within that final meeting, if necessary. In terms of how I would communicate that, perhaps putting the two entities within a joint meeting of some sort, even if that's after that

final presentation, to give them the opportunity to know what we've done so far and then why we are of assistance in another area or as another project.

Speaker 1: That makes sense. And then number seven. So outside of engagements, how would you like to foster your client relationships? Do you think it varies by level of seniority of the client or also how long you've known the client? Or is there anything that would change how you would like to establish and continue this client relationship?

Speaker 2: After the project is over? I think it's contingent on the project. Who's been a part of the project, how invested the project was in terms of influence or impact. So I think there's a lot of factors that go into it. I think the longer, and the more intense the engagement was, the better that it is to maintain that relationship moving forward, whether that's with client calls on a frequent basis or through partnerships on other projects. But I think, yes, it's very contingent on the work that was done.

Speaker 1: And then do you think there are any other relevant situations that I didn't touch on that we encountered with our clients?

Speaker 2: Not that I can think of.

Speaker 1: Okay, perfect. Now we're shifting to just talking about in person versus remote. So in your opinion, what are the drawbacks and benefits of working in person?

Speaker 2: I think benefits are getting to know people better, having a better idea to what the company has available, more networking opportunities that feel less awkward. I think it's just a better understanding of the culture. I think that the drawbacks are the limitations that come with logistics, the need to look or appear as though one is busy, even if there's not necessarily work to be done. I think that there's a lot of time that's potentially wasted whether that's just logistics of moving around or going to meetings that might not necessarily be helpful but feeling the need to pay full

attention to them that might not necessarily be related to the work that you do or to even the client that you have.

Speaker 1: This is perfect. Thank you. And then how would you like to structure in person meetings? Do you think we should go back to traveling Monday through Thursdays? Should we have more dinners or special activities? What do you think would be the best way to structure that?

Speaker 2: That's hard. I don't know because I didn't really get to have that full consulting experience in that way. So I'm kind of picturing based off of what I've been told rather than what I've seen. I don't think we need to be with the client Monday through Thursday, the way that we were before, just because of how much work can be done remotely. I think you could do some sort of like every six week type of in person check-in if we wanted to do that, that way you're engaged into a certain capacity, but not having to engage overly frequently.

Speaker 1: That makes a whole lot of sense. And then do you believe that there are people that especially benefit from in person work?

Speaker 2: I think the newest members and the most senior members benefit the most. I think those people in the middle, especially if they've already had that in person experience, don't necessarily need it to be reiterated many times. But people within their first two to three year probably benefit from the closure and just the newness of the work. People who are more senior benefit from being able to establish relationships for the company for years to come. But those who are in the middle probably already have seen those relationships that probably don't need a refresher as to how to maintain them.

Speaker 1: That makes sense. And then a final one for in person work. Are there any tools, activities, or methodologies that you particularly like to use? I know this one may

be a little hard to, but just think about whatever you can imagine or have been told about.

Speaker 2: An established cadence of having those meetings, being able to talk on a consistent basis, having a good feedback loop. So knowing what the client needs and being able to adjust to that as soon as possible and having some informal conversations as well, so that they don't feel like they are as foreign as they might feel if you're only talking about work.

Speaker 1: Perfect. And now we have the same questions for remote work. So in your opinion, what are the benefits and drawbacks of remote work?

Speaker 2: Benefits of remote work are that there's a lot of efficiency. People are able to do more work at a quicker pace in part because they don't have to worry about their commute or taking a lunch break, for example. There's a lot more flexibility in the type of work that you're able to get away with doing just because perhaps if you have kids or a family or other responsibilities, you might not necessarily be as constrained for time as you would be if you were in person. The drawbacks can be the lack of interaction that you have with your peers, the lack of cultural understanding that you might have with the company engagement with the client and just overall being able to jump between jobs a bit easier in part because of the fact that you have that additional flexibility from not commuting.

Speaker 1: That makes sense. So then how do you like to structure your remote meetings? Is it voice only video? Are you trying to make it interactive?

Speaker 2: Sure, most of the meetings that we have, have some sort of PowerPoint presentation or some sort of display that we're giving to the client in addition to voice. I think the voice aspects of it is one part logistical, and one part there's a privacy component I can imagine as well. One part logistic, just because video can be hard to maintain in terms of bandwidth and things like that. And then one part

privacy in part, because I'm not sure if it's just given the fact that we're still in the pandemic, that it's already an accommodation to do things at the level of which we're doing. It's not necessarily the worst thing to give people the ability to not have to be fully immersed in the video components that meetings can sometimes have in the sense of like, people can show that they're not necessarily look as though they're paying attention, but if you're on video, you might feel more obligated to present a certain way, dress a certain way, look a certain way during meetings that can be overly strenuous that maybe in person you wouldn't have to put on as much of a facade to.

Speaker 1: Yeah, and then do you believe that there are people that especially benefit from this remote work?

Speaker 2: Probably most like marginalized communities. So whether that's working parents, people who might be maybe disabled, it might be people who benefit from it who have logistical differences or might have to commute further that benefit from it. I would say that people who don't benefit from it might be more senior members just because there is a technological learning curve that is required. So people who are not as familiar with technological differences might struggle a bit more with it.

Speaker 1: That makes sense. And then are there other tools, activities, methodologies that you would like, or that you like to use in remote engagements?

Speaker 2: I like the flexibility that we have with meetings and cadence, because there is no physical components so we can move things around rather easily. I like the fact that I'm able to attend maybe more meetings than I would be able to physically. So I guess there's more communication required because you're not in person. So I feel like they have a lot more transparency and also there's a lot more direct communication in part because you don't have the confusion or the filler conversation that can come from being in person at times. Methodologies, I think

there just has to be more consistency in part because of the fact that there is not an in-person component. So that communication and adhering to deadlines is more important because there are sort of no physical reminders.

Speaker 1: I see what you're saying. So that was the section. Next, we will talk about what you would like to see in the workplace in the future. So how do you foresee projects to be structured going forward?

Speaker 2: In terms of what?

Speaker 1: In terms of are we traveling maybe just a little bit, are we going to stay completely remote? What do you think would be the new norm?

Speaker 2: I imagine it'll be some sort of hybrid. I think that traveling consistently will only be on a case by case basis. There are not many projects that require that you're in person all the time. I think that it will lean more towards being virtual for the benefit of the client and for the consultants as well, just because it is cheaper, and it tends to be more efficient. Also, it'll have to do with the experience of the members on the project. So more experience, probably less travel, I would imagine, except for maybe of the most new people and those who are having a lot of client relations or maybe are most influential on the project as a whole. So I think that travel will be one of those unique experiences or once in a couple of projects experiences, but I don't think it will be as much of a factor in every single project that people have as it was before.

Speaker 1: Got it, and then personally, what would be your ideal work structure? Would you travel, would you not? What would that look like?

Speaker 2: I think ideally I would travel maybe once every couple of months. So perhaps, maybe like once every three months, once a quarter, to be able to see the client and visit with them, but because of the fact that so much of the work doesn't require

travel or in person contact, I think I've passed that stage of needing consistent travel in order to understand how our client work operates best.

Speaker 1: What do you perceive we do with our buildings? I mean, we have all these innovation hubs and offices, is there anything you would like us doing with them?

Speaker 2: I think that the difficulty relies in the fact that the presumptions or the things that would be most, amicable or most approved most liked would be things that have to do with maintaining the profitability of those buildings in which I don't think that's feasible personally. I think we're not going to get to a point in which we're using them to the same extent as we did in the past. I think that that would make room for a lot of different opportunities, but they would not be profitable. So there can be community centers, if that was something that they wanted to convert them into. They could partner with local communities to make them into library or resource centers. So there are a lot of logistical possibilities that they could have, but more of it ends up benefiting the social good than it does corporate interest.

Speaker 1: Got it, I see what you're saying. And then how should we continue to strengthen our company culture? Should we have regional days or office days or Christmas parties, do we send gifts around? Do you have an idea on what would help you be more connected to the company?

Speaker 2: I think having more casual interactions would be helpful, whether that means having a seasonal or quarterly get together, having some optional activities that are in person as well could help to kind of give people an opportunity to meet in person. I think something that could be maybe more alluring to members would be some sort of retreat that they could do maybe once every six months, something that would, I guess, incentivize people who otherwise may not want to travel or might not want to meet up in person to get out of their comfort zone.

Speaker 1: That would be so fun, I would be in. I just have the three final questions for you. What's your number one advice that you give a person currently managing a client engagement?

Speaker 2: Consistency is important. So making sure that there are consistent meetings, consistent opportunities to give feedback and that everyone is on the same page is, I think, super important. I think having that makes the work so much easier and so much less volatile for everyone involved because there's a good understanding of what's to come. So I would say that having clear and consistent communication is most important.

Speaker 1: Got it. And then what makes the kind of engagement of success in your opinion?

Speaker 2: I think if we're able to meet the client's need and exceed their expectations, so being able to see what they have as a problem and then correct for it, as well as predict what problems they might run into in the future and make sure to account for that in our solutions also.

Speaker 1: And then do you have any last pieces of advice or thoughts that you'd like to share?

Speaker 2: No.

Speaker 1: All right. Thank you so much.

## **Appendix B2: Analyst 2**

Date:

Speaker 1: Hey, thank you for joining the interview, I'm conducting these for my DBA research. I would like to ask you a few questions about your experience with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes, I consent.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay with you?

Speaker 2: Yes.

Speaker 1: Okay. So we'll first talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: I have worked in consulting for 14 months. So a little bit over a year.

Speaker 1: And that's also how long you've been working for Accenture, correct?

Speaker 2: Correct.

Speaker 1: What career level are you?

Speaker 2: I am a senior analyst.

Speaker 1: And then how many years have you worked in person and how many remote?

Speaker 2: I have worked zero years in person. My work has been fully remote.

Speaker 1: Have you detected any changes in yourself or new habits that you developed since working from home?

Speaker 2: I would say just from my experience, not even with working, but with going to school and doing interviews in person, but then working completely from home, I would say some of my habits are that I feel less motivated to then go meet people in person. So I think because I've only ever worked from home, it's harder for me to want to go into an office or put myself out there to get to meet people.

Speaker 1: I would agree with you. What would be your ideal way of engaging with these coworkers? Would it be also remote then or do you think maybe a hybrid and seeing them sometimes?

Speaker 2: I personally feel like for me, what would be best would be a hybrid, so not going in every day or all the time or necessarily every week, but at least have some level of in person, especially with the team you're working on. I feel like with consulting what's been tough is I could go into an office and be with other people that work for the same company, but

they're not the same people that work on my team every day. And I think a big part of team culture and teams I've been on in the past is having some level of in person connection. I think it just builds that culture, but I also do think the flexibility of being able to work from home is something that's very invaluable because I don't have children, but if you have children, you know, you're there for them. You're saving time with a commute. You can get other things done during the day, if you have some time in your day. So I do think that part is big with having a hybrid type of schedule.

Speaker 1: Do you think it's the same way with clients, would you also prefer to engage with them in a hybrid approach or is that different?

Speaker 2: I think that the hybrid approach would be great as well, but the client that I'm currently working with they're based all throughout the country. So I think it's hard to fully foster a totally in person environment, just because with travel and expenses, I think it saves a lot of time, energy and money to be able to do things. And I think certain things are easily done through a video call. It can be done efficiently, but I think certain times a hybrid schedule would be great. And to be able to actually see the client face to face and do it, you know, the old way, actually give a handshake and meet someone in person. I think it goes a long way.

Speaker 1: Right, right. So in the next phase, I will actually walk you through seven different scenarios in which we engaging with a client and would like to see how you would ideally respond to the situation. So scenario one, you're meeting a potential client and would like to explore if there's an opportunity for a new project. Who is your client stakeholder? So what level of seniority are they and how would you engage them?

Speaker 2: So I would say the client stakeholder, if it's not someone in the C-suite, it's someone that reports into the C-suite. So someone that's some type of director or higher up senior

manager, managing director within a company, or it depends what the client is and how they do their titles. And I really do think if it's the first time you're meeting them in person makes a difference. If it's someone that you've had a long standing relationship with, I think it's something that you could probably do over the computer, but I would say you'd engage them in person.

Speaker 1: And then now you're actually working on a proposal. Who's your time target audience for this? And what do you do to successfully close the deal?

Speaker 2: So the target audience, as in like client side?

Speaker 1: Yes, client side.

Speaker 2: So I would say the target audience would be that same client you went to and then either not just them, but also people that report into them and people that are also dealing with financials and budgets and seeing, you know, what could fit into our budget and what also fits into our company and what our needs are. And I think the best way to engage them is through probably like some type of call through the computer, Teams or Zoom, or even a phone call. I think it's something that's an ongoing process and in the proposal you go back and forth.

Speaker 1: Got it. And now you won the project and are kicking it off. Who's attending the kickoff and how would you like to structure that meeting?

Speaker 2: So the kickoff I would say would be the main stakeholders. The initial client that you dealt with and the main people that will be involved, so the people from the client side that you'll be dealing with every day, not necessarily everyone, but someone that's more of like the boss of other people that are leading it. Basically a leader, then they can get their teams on board with whatever the consultant is coming in to do. I think it depends where the client is, if they're all based in the same office, I would say, this is something that you

could meet in person, kind of have that formal handshake or getting a product started. This is how we're looking to do it. I think if the client is based throughout the world or different parts of the country, you have to take that into consideration. And the best way to do that might just be through a Teams or a Zoom call or some other online platform.

Speaker 1: Okay. And then now that your project is kicked off, you are working on an active engagement. How do you prefer to engage with your client, and does it vary by stakeholder?

Speaker 2: I do think it varies by stakeholder. I think it kind of goes with different people engage in different ways. And I think some people might just be by and handle whatever the consultant is doing just through an online interface or some people might not even prefer a call, but an email. And I think it might be a combination of both. And I think it also depends on the solution you're trying to provide to the client. So if there's certain training that needs to be done in person, that might be better, but there might be some trainings that can be fully conducted online and you can share your computer screen through a call. So I think it's really project dependent and it will be stakeholder dependent as well.

Speaker 1: Perfect. And then now you're at an important milestone or at the end of an engagement, how would you like to present your findings to your client? And who's attending this meeting?

Speaker 2: I personally think it would be great to do it in person just because some engagements are long, some are short, but no matter the length of the time, I think it's kind of a good way to put closure on it and feel like, all right this is what we did. This is what we found, these are the solutions and what we propose moving forward. I'd say the stakeholders would be similar to who's there at the kickoff. Really just on the client side, who is overseeing the changes, any leaders on the client side and even leaders on the consulting side. I don't

know if necessarily, depending on how big the project team is, if everyone needs to be there. But I do think it's a good way to wrap it up and do it in person and even have a way to have a dinner or something that gives a little bit more of a personal connection and relationship between the consultant and the client.

Speaker 1: That makes a lot of sense. So now you believe that there's potential for a follow up project. How would you like to communicate that with your client and if they're different people, how do you communicate with your client versus the person actually giving the sign off?

Speaker 2: So I think if it's a client you've already been working with, this is now that you've built this relationship. And I think the part with the meeting in person and having the kickoff and the closing kind of presentation and dinner, I think you've built that relationship. And in person you can form a little bit more trust than you might be able to online. I think you can continue this kind conversations online, just through a call and, and offer to set something up in person or even offer to them, whatever they're most comfortable with or with their schedule whatever mode they would like best. And I think if someone else at the same company, but someone new that you're engaging, so a different stakeholder within different a department, I think then maybe again you would offer to do something in person first and then if not you provided an alternative. But I think anytime it's someone new, it's good to have that face to face initially and build that trust.

Speaker 1: Got it. And now outside of engagements, how do you foster existing client relationships, and you think it varies by level of seniority or how long you've known the client?

Speaker 2: I do think it definitely varies on that. I think the longer you know someone, the longer you've been working with them, you're going to have a closer relationship or some type of history personally, or professionally and relationship with that person. I think it just

depends. I think if you're both based in the same city, I think it's easier to be like, let's have a quick meeting or grab lunch or something. I think if you're across the country, it's easier to do things by call, but I think it just varies. And depending on how long you know someone definitely has an effect on the type of relationship and how comfortable you are with them.

Speaker 1: Do you think there are any other relevant situations that you encounter with your client that I have not touched on?

Speaker 2: I think everyone's different. I think some people work better in person and getting up and going to the office every day. I think other people do great at home and can actually be very productive at home. I think it's very much a personal journey for people. I do think something that's hard with consulting work from my experiences is sometimes not having a camera on and clients, people on different computers and you're not in a meeting room. Sometimes the focus can be elsewhere. And I do think that is a struggle of hybrid or remote work. I do think some people handle it well. And I think other people it's better to have them engaged in person. They have to give you at least, or fake it, that they're paying attention. So I do think that's a different scenario that definitely can play a part.

Speaker 1: That makes sense. And that actually leads very nicely into our next section. So now we'll talk about your opinion on in person work versus remote work. So the first question is, in your opinion, what are the benefits and drawbacks of in person engagements?

Speaker 2: I think some benefits are that you, first of all, you build a stronger relationship with either your coworkers, your team members, your client, your boss. I think you're able to gauge someone in person and you know things you don't always see on camera with someone. You know just the way they express themselves verbally. Non-verbally I think it fosters a deeper sense of connection. You are living through something together in the moment. I

think some other benefits, especially something that I've learned as I've started my career virtually consulting is it's a lot easier to ask people small questions, or if you're trying to learn something. They can look over at your computer and show you quickly instead of being like, let me set up a 30 minute meeting to ask a question or two, which I think sometimes takes more time and sometimes could make people very reluctant. So I think in person to train and be able to foster relationships is definitely a benefit. I think some negatives is, I do think it does take a lot of extra time that people don't realize. So as a consultant, if you're traveling, you're away from your family, your home, other routines, even if you're not traveling far within the same city, you have a commute every day. I think it adds on a lot of extra time. I think some other negatives, like if you have children or family, if you're stuck in the office, you're not really around for them as much. I think too, like say you have some time during the day, you can get some things done around the house. And I think honestly it saves you extra time on top of already saving time from a commute and being able to be there for your loved ones or any of their hobbies or activities you have going on. I think also some negatives, sometimes I think in person work sometimes might seem very formal and you feel like you need to be very put together and have it all going on. Or if you don't feel good, you kind of need to fake until you make it. And so I think that's a negative sometimes, you always have to be turned on and sometimes it's a lot to always be fully engaged like that.

Speaker 1: Right. So then how would you like to structure in person engagements? Do you think it would even be Monday through Thursdays and weekly travels? Do you have dinners, special activities? What would be your ideal?

Speaker 2: My ideal would be throughout the life cycle of a project to have different points established with certain deadlines that you're going to be in person. So say it's a three

month project. It might be that twice a month you're going in person. So the first month it's the kickoff. Then it's a couple weeks in. You go again, you have some type of deliverable, you present it to the client, you get to meet some people on the client side, your team side, and then kind of a couple weeks at home. And then again, maybe the midway point of the project, presenting a deliverable and being there in person. And then definitely at the end presenting what you've done, what future plans are and having that final handshake and dinner to celebrate and foster that kind of connection. And so I don't know if it's definitely a Monday through Thursday, one week you're in, then you're off, then the next week you're in. I think it could be more sporadic and very project dependent.

Speaker 1: Got it. And then do you believe that there are people that especially benefit from in-person work? And if so, who is that?

Speaker 2: I do, I think people that are easily distracted are better at in-person work. I think sometimes, like I said before, it's sometimes great that you can be home with your kids and your family. But I know personally growing up, my dad has always worked from home. And I think when you're young, I have an older brother who would fight or make a lot of noise. And I think sometimes that's distracting when you're on calls or trying to get stuff done. And I think sometimes it's too much, too many distractions and people need not necessarily a quieter place, because it's not necessarily that the office is always quieter, but they need a place to be like, I'm in the office, I'm putting on my work cap, I'm fully focused on work and when I'm home fully focused on home. So I think for some people that works better for them. I think for some people that isn't always the case. I think also, people that are maybe from an older generation are better at being in the office. I think they grew up in person, had their career in an office and that's what they're accustomed

to. So I think for them and especially say a consultant coming in and doing a technology implementation, I don't think that's always the easiest thing for someone that did not grow up like fully immersed in technology to have a grasp on. So I think sometimes for people like that, or people may be in an administrative role, it could be better for them to be in person.

Speaker 1: Okay. And then do you think there are any tools, activities, or methodologies that you like in particular to use in in person engagements?

Speaker 2: Being able to, I don't know, sit in some kind of space, not necessarily a meeting room that feels so formal, but a place like consulting where they use whiteboards and being able to actually present up onto a screen. I think certain things like that really benefit the in person work and it's not just sharing a screen and looking on your laptop or monitor. So I think certain things like that, but other than that, since I have not worked in person, I think I would have to have more of that experience to be able to pull other ideas in.

Speaker 1: Okay. And now I'm going to go through the exact same question about remote work. So in your opinion, what are the benefits and draws of remote work?

Speaker 2: I think the benefits are, it gives a lot of flexibility. So if you have something going on during the day or you need to run out to pick something up or you have a quick appointment you're able to do that, not make a big scene leaving the office. You're able to kind of dress more of how you want kind of handle your day, how you want get things done throughout the day that you need to, like I know I've had a load of laundry going before and you go and switch it. And it's something that I don't have to do after work, which is really nice. Also saving commute, I think it saves a lot of time, energy and money. I personally am based out of Philadelphia, if I was going and I don't currently live in the city of Philadelphia, but if I was going in every day, I'd have to either pay for train tickets or it would be miles

and gas on my, car tolls, it's just parking it, it all adds up and I would be eating out more. I don't know if I'd be eating as healthy and certain things with lifestyle would definitely be different and not benefit as much. I think some drawbacks with working from home is it definitely gives me more social anxiety, if I have to go in person, like I need to make sure I'm wearing the right thing and acting the right way. And you're so used to being at home and not having to interact with people face to face. It's like, oh, I have to go in. Honestly, I'll be really nervous, so I think mentally that's not something that I think is / will be easy for me. And I like to think I've been a social person and I think it's made me honestly less social in a professional sense. I think some other negatives, I think there are distractions from home. So you can kind of hide behind your computer and do other things and not always be fully engaged on your work at the same time. Some people are good at navigating that, some not so much. I think some other negatives of being at home, it kind of blurs the line between home and work. So I think people expect you to always be available any day, any time of the day. And it kind of takes away from family or friends or other things you have going on in your life that you're just kind of expected to be glued to your computer. So I think those are some negatives. They definitely both have their drawbacks, but also their benefits as well.

Speaker 1: That makes sense. So then how do you like to structure your remote engagements? Is it voice only, cameras, you trying to make it interactive?

Speaker 2: I think a combination of both, I think with a team members that I work with every day. I mean, if we're go through something, I don't think there's always sense of having your camera on and feeling like people are staring at you. I think sometimes it feels like with your camera on, people are like looking at you and I feel like you end up looking at yourself in your little picture and making sure, oh, is my hair look okay? Do I look normal? Am I

sitting okay? Am I moving too much? I personally, I start to have a lot of thoughts like that in my head. So I think it depends. I think with certain client engagements, it's definitely good to have the camera on. I think because you're not in person, it does build a greater sense of connection. You're actually getting to interact, but I think sometimes when you're going through things or you have a really long meeting, it's very draining to have it on the whole time. So I'd say sometimes, it's good to have it, but I don't think it's required all the time. I'd say it's kind of like have it on 25% of the time, maybe 75% not. I think if you're given a big presentation, it might be better to have it on, if you're just kind of listening in I don't think it's necessary.

Speaker 1: Great. Thank you. And then do you believe that there are people that especially benefit from remote work? And if so, who's that?

Speaker 2: I do. I think people that may be more independent and don't necessarily need someone looking over their shoulder, making sure they're getting their work done do fine working from home. They don't need this pressure, extra motivation to get stuff done. They just put their head down and get work done and do well. I think people that have other obligations going and, for example if you had children and need to drive them somewhere at 3:30 PM and can take your call from the car, I think they definitely benefit from that. And I think some people from a newer generation and have grown up more with technology or have been in college with technology or have done school and internships virtually, they're kind of used to that and what's expected of them and have grown up using social media and Teams and Zoom and all of that. I think that are a little more technological or technically savvy. I think they benefit and do better with remote work than probably other people.

Speaker 1: Okay. And then the final question for this section, are there tools, activities, or methodologies that you particularly like to use in remote engagements?

Speaker 2: I think definitely sharing screens. So I think I personally am a very visual learner. So sometimes if you're just on a call and someone's explaining something to you, I catch myself when sometimes I'm like nothing to look at, I'm like zoning out, but when you're actually someone sharing their screen on the call and you can see what they're doing and follow along, I think that is something that helps me learn and helps interacting with people I work with and clients a lot better.

Speaker 1: Perfect. So in the next section, we're going to talk about the future of work. So how do you foresee projects to be structured going forward?

Speaker 2: I think in the future of work, it's going to be very project, client, per individual dependent. I think it's going to be kind of like a matrix of things at play of. I think you're going to have more flexibility to choose the kind projects you want to be on, or if there's going to be stuff that the client's like we need you here every day. Maybe we have an older workforce or whatever they're trying to implement it just works better, they need it done in person. I think the consultants that want to be there every day are going to be able to do that. And I think there's also going to be stuff like, the project I'm currently staffed on people are based throughout the country, both on the client side and the consultant side. And I just think in my head, like it will cost so much money to have everyone fly in when we can really do the same thing virtually. So I think the future of work, I don't really foresee. It's not going to be an one size fits all type of model. I think it's going to be very dependent, but I honestly don't really see it going ever back to five days in person. I think in certain industries there's pressures. So maybe, like in my head, I can see like a financial industry where they work crazy hours and they show up in person and their suits and ties, I could

see some of those industries more, but I think other tech and consulting, I think we're so used to this flexibility. And I don't think people are going to want to be trapped five days. I think people like the flexibility or if they're traveling or have things going on, they can work from anywhere without having to take a day off and kind of take a long weekend and take their work with them.

Speaker 1: Got it. And then personally, what would be your ideal work structure? Is it just what you're describing right now?

Speaker 2: That is it, yes, exactly what I'm describing. So personally my project, if you know, I have been on the engagement for 10 months, if I was restarting it again, we would've spent the first week or two in person getting to meet the client, kind of getting a grasp of what the client culture's like, who our stakeholders are, how they work, what we're going to do for them. And I think there might be certain points throughout the project, when we have deadlines coming up or for example, they had a big summit presentation going on, like maybe around then we would be in person and maybe we will actually go out to dinner and kind of have more of a personal combined with professional relationship with them, not just fully professional. And then I think at the end, but I think at times throughout it would be hybrid.

Speaker 1: Okay.

Speaker 2: And actually mostly probably from home.

Speaker 1: Okay. And then because of more work from home, what do you foresee us doing with our buildings? Do you think the innovation hubs and offices, are restructuring their use?

Speaker 2: I think they're going to have to be restructured. I think some of the office spaces are quite big for the amount people that will go in. And I kind of think the environment needed to become more collaborative or inviting that you are actually going to want to go. There's

still COVID restrictions in place, but to have to go and sit in a cubicle and be at a desk all day by myself, well, I can do the same thing at home and be in my room with my door shut and sit at my desk all day. So really what's the difference. I think, going into an office, they're going to need to make it more of a setting for you to come engage with your team and be in a collaborative environment. That you can't replicate at home.

Speaker 1: Perfect. That's leads nicely into the next question. So how should we continue to strengthen our company culture? You know, should we have like region days, office days, Christmas parties, do you think sending gifts to people's homes would be more successful?

Speaker 2: Yeah, I think having more recognition. I think people handle feedback and recognition differently, but I think doing something or being able to send some type of monetary or even non-monetary type of reward, I think makes people feel valued even when you're working from home. I think sometimes it's very much like, I'm just doing the grind, I'm working from home, whatever. And it makes you feel like I'm recognized for a job well done. I'm sitting wearing sweatpants, but I'm still doing a good job. I do think certain office days are fostering a kind of sense of engagement. So I was supposed to go in to get my badge a few months ago and I think they made it a whole days to have a lunch and meet some managing directors. And I think events like that motivate me more to go in. Whereas sometimes I feel like if things are office wide or industry wide, it can feel, especially for me personally, that I've never been in the office. It feels like very intimidating, like I don't really know anyone, who am I going to engage with? So sometimes I think smaller groups is honestly better or thinks to do moving forward and some more team get togethers. So if you have people on your team that are based out of the same region or office, I think, being able to do that with the MDs that you report into, I think there should be more

focus on that because I think that's who you're actually working with day to day and the company's so big, sometimes it's like, well I could go to a happy hour or get together, but really I'm never working alongside any of these people. We work for the same company, but I never cross paths with them. So it doesn't feel as much of a connection to just meet people like that.

Speaker 1: That makes sense. All right, the final three short questions. The first one is, what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: I would say set expectations up front and definitely do what a client wants. So if the client is happy, fully remote, adjust your work for them. Tailor it toward them. So if they want to be fully remote, follow along with that, if they want to be in person or do hybrid, whatever their expectations are, set them up front.

Speaker 1: Okay. And then what makes a client engagement a success in your opinion?

Speaker 2: My opinion on what makes that a success is the value that you're bringing. So like for example, the current engagement I'm on, I feel like we're bringing them success because we're helping them build their business. And yes, we're doing that fully remote. So I don't think just because you're all in person and getting to meet with them every day and shake their hands necessarily means it's a success. Honestly, that kind of project could end up being a complete failure. I think it's making the client's lives easier, their business better and providing some type of value that they didn't have without you is what really drives success.

Speaker 1: Okay. And then the final one, do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: I would just say, I think this goes in line with a lot of the answers I've been giving is, I think it's very individual, company, client dependent. I don't think it's a one size fits all. I think

some people prefer to be in all the time. Some people do not. Some people would like some kind of hybrid and meet more often. Some would like hybrid, but not meet as often. So I think it's just very context and individual dependent and you got to do what feels right for you and what's going to help you grow as an individual and grow your career professionally and personally.

Speaker 1: Perfect. Thank you so much for your time.

### **Appendix B3: Analyst 3**

Date:

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay with you?

Speaker 2: Yes.

Speaker 1: Perfect. So first I'd like to ask you about your experience in the workplace. How long have you worked in consulting?

Speaker 2: Yeah, so I've worked in consulting for almost a year and a half, which is kind of crazy. I guess I also did an internship before that for three months, and then took some time off, back to school and then back into consulting for the year and a half.

Speaker 1: Perfect. And then how many years have you worked in person? How many remote?

Speaker 2: In general, I guess if I were to add up internships, those were in person, but like just thinking about Accenture that would be like three months in person and then

a year and a half, not in person. One week of that was in person, but otherwise remote, most of my career has been remote for sure.

Speaker 1: Okay. And then have you detected any changes in yourself on new habits that you've developed since working from home?

Speaker 2: That's really interesting. I mean, something I've been thinking about because, because so much of my career has been remote. It's hard to know is this something that I just would've done because of who I am or because is at the setting. And I definitely think habit wise it's really easy for me to be distracted when I'm at home. I think looking around at my peers and my people with my life, it seems like you either have people who work from home and maybe have tendencies to work a lot. And then they work a lot more or maybe have people who work, who like don't love working and then they it's easier to not work. I think I'm sitting in the camp, that's it's easier to not work, easier to get distracted. If you have something going on in your life, like I happen to have right now that pulls you away from work. It's so much easier when you're remote and no one can tell. And it's hard to know if that's you, there's so many new things coming out of college, like this new job, living here for the first time, all the things, it's hard to know what to attribute to those tendencies, but I would definitely attribute a lot of it to working remote probably if I had to guess.

Speaker 1: And then what is your preferred way of actually engaging with coworkers? Would you say it's in person, remote, hybrid?

Speaker 2: Certainly in person. I find that I'm just like, it's so much more natural for me to interact in person. And I think about presentations, and I used to really like presenting and presenting for whatever reason over Teams or Zoom or you name it, I find would be incredibly uncomfortable. Whether it's like just a personal interaction, just catching up or actually like interacting in a client facing presenting kind of environment either way. I'm like I'd much, much rather be in person.

Speaker 1: I think you have to answered my second question, which would be your preferred way of engaging with clients. So I'm guessing that's in person?

Speaker 2: Yes, I guess so. I'll tell you a little story. I had my first project at this consulting firm was like eight months long and I worked essentially embedded into the client team and my boss was an employee at the client essentially. So he was essentially my manager and I didn't actually ever see his face. I didn't have a camera on my computer, he might have, but because all the consultants did not have cameras, so we always had our videos off and he did, too. And we went eight months and we never ever saw each other. How is that? I brought it up one day and he's like, I looked you up on the internet to see what you looked like but otherwise would've not had any idea. There was no body language to see, so that was a really interesting experience where I went literally eight months without seeing my manager. And you know I'm in calls now with people in France and I'm about to start having calls with people in Israel and it's really far away. It's great that you can connect with clients so far away, really easily remote, but I think I would be a lot more successful if I could have lunch with them and understand them more as people.

Speaker 1: That makes a lot of sense. In the next phase of the interview, I'll actually walk you through seven different scenarios on situations in which we engage with our clients. So the first one is you're meeting a potential client and would like to explore if there's an opportunity for a new project. Who's your client's stakeholder? What level of seniority do they have and how would you engage them?

Speaker 2: Wait, sorry. Do you mind repeat the first part?

Speaker 1: You're meeting a potential new client and would like to explore if there's a project opportunity. So you've never met this person, who is this person? And two, how do you engage with someone you haven't seen before?

Speaker 2: This is just like hypothetical who would I reach out to? Who would I like reasonably reach out to? Who would I like optimally reach out to?

Speaker 1: It's almost more like an elevator pitch, right? You don't know this person but ideally what position would they hold, so that you can even explore a project and then how do you talk to them? Is it an email, is it a call, is it a dinner?

Speaker 2: That's a really interesting question because I've never been in the kind of sales role. So, it's not one that I've thought about much, but that's a really interesting one. And I'm curious about like how it works. I guess pre COVID and post COVID for most people, what would I do? I guess I would love to actually meet someone, I think about the classic on the golf course or something like that, or at a networking event or something like that. I definitely do picture that in person. I don't know how I could reach out to them on LinkedIn or something otherwise, but I think in person again probably is a little bit more natural for me and as high as you can is always good.

Speaker 1: And then now you're actually working on a project proposal. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: I'm not super experienced in this but the target audience would probably be... Should I be like making up a hypothetical project or just kind of just generally speaking, like based on what I'm doing now?

Speaker 1: If you're closing a new deal right now, how do you engage with your client? Who is your client? Is it someone in the field or is it an executive and then do you think that'll just be emailed? Would you need to meet with them? How do you structure it?

Speaker 2: I think I would imagine when you're starting out, like really building confidence, would be key confidence in that relationship would be key. I think that's a lot easier to do in person and just building rapport, so I would think it would be in person. I'm

thinking about my project now and we have a pretty senior executives, but the people we work with are somewhat more hands on in the product. They're still certainly leaders at the company, but if I convince them and build rapport with them and then have them help you pitch it to the senior person, that can be key. I think at that stage it's really all about developing those relationships and trust and, and letting them know that you're worth the money that they're about to spend on you.

Speaker 1: Got it. And then I think these next scenarios will be one you've experienced before. You're now kicking off a new project, who's attending the kickoff at and how do you like to structure the meeting?

Speaker 2: That's really interesting. Where I'm working now they have a really interesting way of doing this, where you have a bunch of activities, like a very fun group. I just worked on a kickoff deck last week, but they're really all about, again, that like building relationships. We do we start off with an energizer, which can be something stupid like we will have three photos of frogs and we have to get everyone in the room to tell us what do you think this frog does for its hobbies? Just goofy photos of frogs and then everyone's generating ridiculous ideas about what the frog does for fun and then we will usually walk through our purpose, our process and the payoff. And then walking through just a lot of norms and then more icebreakers, and it's really all about serious open communication and getting everyone on the same page and being collaborative and getting everyone in the room talking really early on. This is the first group that I've seen that has this approach of just being weird. And we're often working in Mural or Figma where everyone's playing around and interacting. So I think that's really good. It seems like I haven't done this kind of kickoff with clients in person. I know that my team would have a strong preference for that because you have those big pieces of white paper and everyone's putting things up on the walls and you cater food and

it's like a lot more fun. So I think it seems like the team is really excited to go back in person, particularly for workshops. I've talked a lot about like the value of in person work. I think there's also some serious value in working from home as well and working remotely, which I can speak to now, if you want?

Speaker 1: We'll get there. So now during an active project, how do you preferred to engage with your client and do you think it varies by stakeholder?

Speaker 2: How do I prefer to engage my client? You know, I'm in an interesting position because I had this first project where I was embedded into the client team and it almost didn't feel like it was consulting because I had an email address for this client, I had a computer. A lot of clients didn't know that I was a consultant. And so that didn't even really feel like I was engaged. Like that was an interesting one. And then I moved into a series of projects where I was kind of behind the scenes working on some dashboard development. And then I worked on an internal project where our clients were really other executives at this consulting firm. And now I'm working on my first project where I have clients in a more traditional consulting relationship, where we have status meetings with them every week and they're approving everything. This is my first experience and I've been doing it for six weeks. I'm not extremely familiar with the typical client relationship, but how it's going now is we have stand ups, it's a lot of deck making. My manager hates making decks and he thinks it's a complete waste of time. I haven't seen a ton of other ways of doing this, so it seems to be working. I've never been a fan of status meetings and stuff like that. We're also kind of in a weird, slow stage where we're waiting for the project to really kick-off. But I think a lot of the meetings in the future will be ideally more collaborative, we will be like using stakeholder input to continue the ideas we're working on and stuff. But so far the status meetings are a little blah,

and it feels like you have to prep something for them when, even if there's not really anything to that you need to cover.

Speaker 1: Got it. And then if you think of any important milestone or the end of a project, how do you think you should ideally present these findings and who is attending that meeting?

Speaker 2: Interesting. You know, that's just been discussed on my teams as a moment when you might want to be in person, we considered it on our last project and then didn't do it. We considered it on this project and my clients right now is in Paris. And then the client that will be joining is in Israel. We may consider going to either of these places, I haven't told you that, but either of these places for workshops and then perhaps a final share out, which is pretty exciting. I think that does feel like maybe a time when it be important to be in person. I think it might vary on the project, a project like mine, our clients are really meant to be involved the whole time in guiding the ideas because I'm working in innovation consulting. It's all about collaboration and getting as many ideas onto a page from anyone involved and bringing them along for the journey. So ideally, they already know about those ideas. So in my space it's probably helpful, but maybe not critical if you're working on maybe a typical strategy project where you're kind of behind the scenes crunching numbers, thinking through a plan. And then if it's truly a share out that the client hasn't seen yet, it is probably key to be in person where you can get all the ideas in the room and the energy in the room and understand what the vibe is. It seems like those critical milestones would be moments when you might want to be in person.

Speaker 1: And then you believe that there's potential for a project. How do you communicate that with your client? And if they're different people, how do you communicate with your client versus the person that's actually giving the final sign up?

Speaker 2: Again, so I think to me, this would be a little different from my answer in the beginning. And maybe in the beginning, I was assuming that you're trying to start work with somewhat of a stranger. Now you have a relationship with them. I think that would be a time when you could do it remotely, because you have that trust. I think it's all about trust and rapport and if you know each other at that point pretty well, you could probably just have some calls and stay in your house. I think you work with them to whatever needs to be prepped for that higher level executive and I think that that could be done remotely.

Speaker 1: Okay. And then outside of these engagements, how would you foster an existing client relationship? And do you think it varies by level of seniority or how long you've known the client?

Speaker 2: Sorry. What was the core of it again?

Speaker 1: So your client, you've worked with them before, but how do you keep this relationship going? Is there an interest to go to dinners? Do you send emails? Do you go golfing? I mean, you mentioned that before, right?

Speaker 2: Right. Again, I do not have any experience, but my guess would be...

Speaker 1: And it is about the experience; if you were in these shoes, how would you ideally structure it?

Speaker 2: Sure. I guess it would depend on if they're in your local area or not. I think about my boyfriend, who's also consultant and he has really good relationships with his former clients. They send him Christmas cards and it's very sweet and they'll text him every once in a while. And so maybe it's just like those little moments where you can say like, "Hey you're someone that I think of" and I'm sure there's a line between the personal, where you're sending family photos and stuff and, and Christmas cards and, and maybe just sending an email, if you see an article that's relevant or something like that. If you're in person and you're both in the Denver

Metro area, then you know, maybe there are opportunities to do things in person. I don't know enough about the rules around that but probably just showing like, "Hey, you're someone I think about" and in a professional setting, if you can be like "Hey, here's an article that might be relevant to you" or something like that. But that's something I haven't thought about. And I'm sure a lot of, a lot of senior leaders at Accenture have to think about that all the time. That's probably really challenging.

Speaker 1: Yes, we'll see when I interview them. Do you think there are any other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: That's a good question. I don't think so again, because I don't have a ton of actual client experience.

Speaker 1: All right. So in the next section, we're shifting focuses and are talking about your opinion on in-person and remote work. So in your opinion, what are two benefits and two drawbacks of in person engagement?

Speaker 2: Okay. Two benefits and two drawbacks, two benefits are building the relationships in like a really genuine way that gives you energy, and then probably a second one would just be getting out of your house and kind of living a little bit. I'm going to take PCO next week but I really just want to relax and recover. And it hit me yesterday, I'm just going to be still in my house. I just never leave this house, so probably just getting out and experiencing the world and meeting people and building those relationships. And then two drawbacks would be, I think it can be time consuming to have to travel. I traveled literally once it was to Chicago for the week and I found it to be really draining and potentially because it was my first week of traveling, first week meeting my team. I hear that the first week can be really tiring, but I came back and I was like, I don't want to travel for a while, and so I think it's just time consuming. You lose some flexibility like this morning I was

able to work out, and then shower and, and then jump on a call. But if you have to add a commute in and you have to add packing a lunch and all the other things, it just takes up more time and time is one of our most valuable things. So, the exhaustion and the time would be the drawbacks and maybe lack of flexibility if I were to add that. For a certain reason, say you have contractors come into your house you're home and you can talk to them. So having flexibility when you need it is helpful too.

Speaker 1: That makes sense. And then briefly describe how you would like to structure your own in person engagements. Do you think it'd be Monday through Thursday, weekly travels, dinners or special activities?

Speaker 2: What would I do? I think hybrid is the move. Even when I was in person, when I was an intern, we had the opportunity to be working from home every Friday and I'd do that every week. It is just nice to be able to have it be more relaxing I guess, so I would integrate hybrid work. I think probably touching on those milestones like project kickoff, meeting everyone, maybe a checkpoint in the middle and then maybe the final presentation could be in person at the client site. I think people would look forward to that. It would be a team bonding experience for your internal team to be on the road together. Do I think it needs to happen an every week, definitely not, I think it's a waste of money, frankly. And I think it's a waste of our resources in terms of the environment. Do we really need to be getting on planes every week and flying? I don't think so at all. I think we could really cut back on our emissions there by just joining from our computer at home. I think for people's mental health, it's important to not just be in your house alone all day, so blending and then if you could have there's opportunities to meet with your internal team, I know teams are all over the place. My team's in mostly New York city and some in Chicago but say you have a team that's Accenture Denver employees, maybe

getting together with them once a week in the office would be helpful. But I don't see a world where I'd want to do either. I actually am looking at other jobs right now and I don't want a fully remote job at all. I think I need social interaction for sure. At one point I was working at a coworking space because I was just losing my mind working at home and it was hard for me to be productive as I mentioned before. So I went to a coworking space and it was just nice to have other people around who are also working and you don't feel like you're just alone in your kitchen. I think for people's mental health, at least for mine, it was really helpful to be in a space where other people are working to have the separation of work and home life, but having flexibility is key. So the jobs I'm looking for now targeting hybrid jobs, I definitely want a home base that I can go to and go to happy hours and meet people and network. And I think that's going to accelerate my career faster than just sitting in my house would, but I also really want to go do a long weekend in the mountains. I can work from there and that's such an opportunity too.

Speaker 1: Now we have the same questions about remote work. What are two benefits into drawbacks?

Speaker 2: Yeah, so I realized, I think I answered the benefit incorrectly. The flexibility should fall under the remote work on the pro and maybe it's just the reverse, but that would be pro of remote work. And then flexibility, to just expand on that again, that would be like while you're at home doing your normal thing and you need to go to dentist appointment or whatever is super easy, or if you want to go and work from Santa Fe, you can do that. I saw a job the other day that popped up that said you can work 25 days out of the year from anywhere in the world, like abroad included. Also, I remember when I was an intern, we really didn't have much going on and I would just sit in the office for the eight or nine hours talking to my manager about

fantasy football and stuff. We were just trying to kill time. And sometimes it felt okay, like I would rather just be doing something else, but because I'm in person I have to be working. It's nice in the moments when you, like you finish your work on a Friday at four, you can just sign off and go for a run and do your thing. I think that's really nice. Did you have a question on it that I didn't answer for the pros and then I can answer the cons?

Speaker 1: No, I think its just the cons I'm missing.

Speaker 2: Okay. So cons would be, again, mental health. I've noticed for myself, I don't know if I said this explicitly, but I told you my boyfriend works as was a consultant. I don't know if I mentioned that he's gone every week. And so for the last couple of months with some breaks where he'd be home, but to generally speaking, I would be alone Monday through Thursday. He'd come home Thursday night and then be working Friday. So Monday through Thursday, I'm alone and when I'm working, I'm talking to people, but I still don't really feel truly connected. And then I'm still at home alone. I think this just can't be good for just wellbeing. So I think that's definitely a con and then the other con would be, I'm the engagement lead for the Denver CDP, which is our analyst community and I've had some conversations with our lead about all the opportunities that the analysts are missing because they're not in person. You don't get the networking, there's some benefit to just being in the room when conversations like the ones we were talking about where you're trying to sell new work and stuff are happening. You're not part of those conversations anymore. Maybe you're not adding those calls. You're just there to absorb and soak in like a sponge, all this learning. And now you're just at home. So I think that's definitely a con too. Just to summarize, it seems like there's pros and cons with both. And that's probably why I sit somewhere in the middle of the hybrid world.

Speaker 1: That makes sense. And then for remote work engagements, how would you like to structure them? Do you prefer to have the camera on, screenshare? Do you try to make it interactive? What do you think is the best structure and then also maybe tools or methodologies that you like to use?

Speaker 2: That's a really great question. Something that I struggle with, that I haven't solved, is when you're presenting and then everyone else is muted and they're just little bubbles, it's kind of hard to gauge the reactions of the audience. So I'd love a tool that would solve that. That would make it feel more like you're in person. I've talked to other analysts at least who kind of feel the same way. I guess it's good when everyone's muted, but it's again kind of awkward. I like to have my video on because I like to get as close to these persons as I can. There are also times when I don't like to have it on, like I was on a project where I started working at 6:45 in the morning and no, I did not want a video on at that time. I also recently would get on four hour calls with my team trying to problem solve and just working on the moments of problem solving where we're just working on a deck or something. And I just want to sit on my couch and talk to you, be working on this. At one point it was like 8:00 PM. And I don't want to still be on video sitting at my desk. I want to move around and it's a lot easier if you don't have your camera on for that. So it depends. And sometimes no having that eight months stretch without ever seeing my boss on camera, I think did not necessarily help our relationships. I think camera on can help. It doesn't need to be on for all times. I do think the collaborative tools like Mural are nice because you can kind of get everyone involved. I hate screen sharing. That's I guess a challenge of remote work is, I hate screen sharing and editing something live and with Mural, you post something and then everyone just has stickies or can be editing the text as well. And that feels a lot more natural to me than pulling something up on teams. I can't see anyone's

face so sometimes I'm presenting something and I don't know when to step in because I can't see them. And then I'm also having to edit live in front of everyone and I despise that. So the collaborative tools where everyone's involved in, there's not a single person having to make all the changes is nice.

Speaker 1: Great, so now we're actually talking about the future of work. How do you foresee projects to be structured? I think you kind of answered this. It's just a hybrid and depends on when you have to meet in person. Right?

Speaker 2: I think so.

Speaker 1: And then personally, what would be your ideal work structure?

Speaker 2: What do you mean by structure?

Speaker 1: Would you go in, do you have fixed days where everyone has to go in or anything like that?

Speaker 2: You know, I also just applied to a job. Well, I didn't apply, but my friend wrote to me about a job. And one with bullets was that you basically make your own hours. And if you get the work done, then you can do it when you want to. I don't know. I'm curious about how that would work in practice, but it's interesting to me because something that I'm really struggling with with work right now is, I wake up at like eight, I get online at nine and then I work till five, but then it's dark and I'm tired. And I should work out, I should do this stuff but at that point, I just want to sit around on the couch and I'm curious about a structure where I could get up at eight, but not start till 12 o'clock. And then go outside and get some vitamin D and go for hike, whatever it is, run some errands while other businesses are operating and start at 12 o'clock. And then instead of the lunch break, it would be a dinner break and I'd work until eight or nine. I think that might be a better fit for me and my lifestyle and feeling like I made the most out of my day. And so I'm intrigued by the flexible hours piece. I'm trying to think about what other factors you could shift.

Speaker 1: What about how often you want to engage in person versus remote? Because you do want the long weekends, right? How often do you want to meet with others?

Speaker 2: I would think like one to two days a week in person, assuming it's just a local commute and then maybe if it was not a local commute and you're traveling, it would be a week out of the month or something like that. I think that would work for me, I'm definitely on the more introverted side. And so a week out of the month would give me the social interactions I need, and then I have three weeks to kind of be at home and have a more relaxed setting, but then have something look forward to instead of the endless I'm just going to be here in my house. Maybe that's what I would do depending on what type of travel you're doing.

Speaker 1: And then what do you foresee us doing in our buildings? Do you know these innovation hubs and offices that we have, how do you think we should use them going forward?

Speaker 2: Yeah a great question. I know the team that I'm working on now has a focus on collaboration happening in office. And they work out of New York and Chicago and I asked how it was going to work for me if I'm in Denver. The first message was that we'd want you to move because collaboration in person is really important to us in our studios. And then I've gotten some other messaging around how we can probably make it work remote. It's very unclear. Another story I'll tell you is when I was in person that one week, it was really interesting because me and another teammate were traveling. It was the one week of the whole project that we were going to be in person. I booked rooms for the Chicago office for the whole team and I got everyone approved. Did all the logistics, all they would have to do is commute to the office, go up the elevator and walk in the room, right? Like there was no other difficulties there. It was really interesting to me how people did not show up, it was their first opportunity to meet these new team members that they'd

been working with for a bit but hadn't met in person. It was an opportunity to be in person and connect and every day they'd be like, oh yeah, I might come in. And then it wouldn't work, it was really interesting. Because I was like, okay maybe I could do this job long term because people that I'm working for have the opportunity to come in and they're not, they don't want to take the 30 minute train ride. They just don't have to, they can just jump on a call. Those moments of doing some people that are in person and some people that are remote are really challenging. And I think technology would have to advance to make that smooth. It was interesting to me, like in a little experiment seeing our office is open, you're allowed to come in with a new team and they don't come in. So I think people are a little lazy and they're, even if it's an option, they won't come in. We were even started with this, but no, it's like an interesting moment of like, even if they're given a choice I don't know if they will. Okay, so what are the offices going to look like? I think big picture people talk about collaborating in person and then maybe it's just more of a social space or more of a space where you meet clients. I don't think individual work needs to happen in an office. I personally am someone that like, I need essentially silence to do good work and I've got noise canceling headphones and in school I would always go to the quietest part of the library. So that's a challenge for me with working in person. I think it's really hard for me to work if there's noise around. So if I'm at home that's another benefit, but it does feel like the collaboration, the social stuff, anything where you do need other people to be successful probably should happen in an office. Maybe the stuff where you can individually be successful, you could do anywhere like a coffee shop.

Speaker 1: And then what do you think we need to do to strengthen our company culture? Office days, Christmas parties, do you think sending more gifts? Like whatever it could be?

Speaker 2: I wouldn't say sending more gifts because I've gotten a number of gifts that I'm just like, thank you, but they're really random things. I guess they're nice, but they tend to be a little bit random. I'm trying to think about comparing my internship in person. We did have events for the world cup event where there was drinks and people were watching it on a projector, that was really fun. At the same time I was an intern and didn't know anyone in the office. So it's kind of like, do I want to go to that event? And if you can meet up with people it's fun. My boyfriend's company, they do a trip every year. So they're going to go to either San Diego or Mexico and spouses and partners are invited, which is really fun. They have a big Christmas party, so I think they do the social events really well. And I think it's something to look forward to. It's something that builds community and you actually get to bring your spouse and family into the fun, which is probably good for them to feel involved too.

Speaker 1: Awesome, and then my final questions, do you have any last piece of advice that you would like to share when it comes to workplace settings?

Speaker 2: Yeah, I guess I'd love at the end of your research to learn more about what you uncovered about how this affects women and I've heard mixed reviews, but one of the last things, most recent things I've heard is that remote work is not great for women because women tend to end up having more responsibility at home. And if they're at home all the time, then more of that is just falling on their laps and they can't do work. I've also heard the flip side where if you give women flexibility, then they're able to stay in their roles for longer. They don't leave the workforce. So I'm definitely really curious about what the verdict would be there and curious about your thoughts. So that's something that's on my mind, especially as a woman and I probably won't have kids in the next couple years, but probably in the next five to seven years, I'll have kids. So how is that going to affect me? I don't know about

anything else right now. I put on some virtual events for the analyst community and those are fricking difficult. They're just so awkward. And people don't want to join events virtually after work. So our team has kind of stopped away from doing them and shifting focuses elsewhere, waiting until we can get people in person to do things. Because I just think those are really tough unless you really know your team. Well, it's just awkward and you can't break out. I have a friend from college who's developing a tool called Twocam that might be worth exploring and it's supposed to emulate in person events virtually. So instead of one room where everyone's talking and you don't really know when to it's a room with bubbles and you can go and have conversations with just a few people. And then you can go back into the room and move around, like as if you're walking between tables and walking between little groups. And so that might be something that's worth exploring in your research because it's like trying to figure out how do we make this feel like the real world and way more natural instead of 45 people in one room. I'm actually going to a virtual wedding this weekend. I'm really curious about what that will be like, but I've also been to virtual baby shower and they're just awkward. So I got to try out that tool because that might help.

Speaker 1: That's awesome. Thank you so much.

#### **Appendix B4: Analyst 4**

Date:

Speaker 1: I'm conducting these interviews for my DBA research and would like to ask you a few questions about your experience with varying workplace settings. The interview will last about 30 minutes. Do your consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to final a project. Is that okay with you?

Speaker 2: Yes.

Speaker 1: We're first going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: For about a year and four months.

Speaker 1: Perfect. And then how many years have you worked in person and how many remote?

Speaker 2: I haven't worked any years in person since graduating every year that I've worked has been in a remote setting.

Speaker 1: Okay. And then have you detected any changes in yourself or new habits that you've developed since working primarily from home?

Speaker 2: Yes. I've noticed that because I don't go outside as much. I feel that my settings don't change. So sometimes I feel stagnant in things that I do when I go about my day. So I have to actually go the extra mile to find further extracurricular activities in order to not feel that way.

Speaker 1: That makes sense. And then as you think about your workplace, what is your preferred way of engaging with co coworkers? Would that also be remote or in person, maybe a hybrid?

Speaker 2: I think hybrid because I think balance is best. I do see benefits of the flexibility of working remote, but so the networking opportunities that come from in person, I think is a lot easier to connect and build relationships.

Speaker 1: Got it. And then is that also how you would prefer to engage with client?

Speaker 2: Yes. Hybrid? Yeah.

Speaker 1: Okay, perfect. So in this next phase of the interview, I will guide you through seven scenarios. So seven ways in which we interact with our clients and there's no right or wrong answer, it's just about your opinion and your preferred way of engaging with the client in these situations. Scenario one is; you're meeting a potential client

and would like to explore if there's an opportunity for a new project. Who's your client stakeholder, what level of seniority are they, and then how would you engage with them?

Speaker 2: Okay. So if I'm meeting with someone, so you said I'm meeting with someone for, can you repeat that last part?

Speaker 1: Yeah. So it's a potential client, right? You don't know them yet, but you would like just like to have a conversation with them to explore project opportunities.

Speaker 2: Okay. Okay. So how would I go about it?

Speaker 1: Correct. So who is that client? Is it an executive or is it someone more on the lower end of the level of seniority? And then how do you have this conversation? Is it in person? Is it an email? What do you think?

Speaker 2: Okay, so I would try to talk to someone on the executive level. So it's not too many chainx of commands that I have to go through and I can speak to the direct person. And I would like to set up an initial virtual will meeting just to establish what the in person meeting would be. And so I guess my answer would be both because I would want to not waste their time and let them know what it is we would be meeting for in person by getting on a phone, just giving a brief description of my plans in terms of like getting them on board with what I have an idea for, but then sitting in person to really map it out and further the relationship.

Speaker 1: Got it. And then, in the next scenario you had your conversation and you are now actually working on a proposal for this client, who is your target audience? Is that still the same person that you already talked to and what do you do to successfully close the deal?

Speaker 2: So I guess at that point my audience would be him or her and all other parties needed to push forward with the deal. And that would be the, I guess, on the executive level, those who would be in charge of moving it forward, that would my,

the target audience. And then the second question was, can you repeat that one more time?

Speaker 1: Yes, what do you do to successfully close the deal? Is there another meeting, do you send them speaker notes? How do you structure this?

Speaker 2: So to successfully get the deal? What I would do because businesses supply and demand, I would see what demand that they have a need to meet how it present. Certain things that I saw that could be provided through the deal which they could, benefit from and show them how, by working with us, it can save them money, but also make them a lot more money and show them areas that maybe they could be working smarter. And I think that could definitely close the deal at that point by just showing the efforts that I took to research where they're currently at compared to where they can be with the proposal.

Speaker 1: Okay, and now you won this project and you're kicking off this new project who is attending the kickoff and how do you structure the meeting?

Speaker 2: So The kickoff, I would have both sides, the executives who need to be in from the partner side, but also from the consultant side. I'd have a couple managers as well as people who are on the phone serving as analysts who can record notes so that we can overview the meeting.

Speaker 1: Got it. Perfect, and then during an active project, how do you prefer to engage with your client? And do you think it varies by a stakeholder?

Speaker 2: Yeah, I think it varies by the stakeholder and by the budget. Because if it's cheaper for the client to just meet more days virtual, then it would just make more sense.

Speaker 1: Great point. Perfect, and then you had an important milestone now or are at the end of your engagement, how would you like to present your findings to your client and then who's attending this meeting.

Speaker 2: So, and this is, you said an important milestone, correct?

- Speaker 1: Yes, correct. So an important decision or the end of your engagement.
- Speaker 2: Okay. So if I'm at the end of my engagement, I'm going to present it in a way where I provide solutions, but I also provide work that can be done to further the relationship.
- Speaker 1: And then do you think this would be rather in person or on a call or maybe with camera on or how do you structure this?
- Speaker 2: I believe that if it is on a call, it should be camera on. However in person could be very effective because it would give me and the team an idea of how the room is feeling because everybody can feel one another's energy in the room. So that would be pretty helpful with closing a deal.
- Speaker 1: Got it, makes sense. And then I think you already started touching on it, but this is actually the next question you believe that there's potential for a follow up project. How do you like to communicate that with your client and if they are different people, how do you communicate this with your client versus the person actually giving the sign off?
- Speaker 2: So I would communicate just by showing, well for one, by building the relationship through the current project and making that my main focus. I feel that it will create a level of comfort for the client. That being that this is something we started on, it would be a lot easier, once the level of trust is there, to further the project and extend it on with us on other areas of work, because they've seen that we've met the deadline and they were pleased because we were focused on giving them a hundred percent on the current project. So when proposing the next project, or timeline and idea, I would just work off of what we started so that they know that, you know, I can reference something that they had a good experience with and then try to grow on that.

Speaker 1: And then last scenario, outside of these engagements, how would you like to foster existing client relationships?

Speaker 2: I feel that fostering client relationships in person can be very beneficial through business meetings. I think what can be helpful too is for, you know, connecting and talking about things and sometimes an informal setting that allows you to get to know the client or stakeholder as a person and where their mind is for what they're trying to do, because it gives you a better sense of what's proposed and also builds a level of trust with the in person setting.

Speaker 1: Got it. And do you think it changes based on how long you've known this client?

Speaker 2: Yes. I think it definitely changes because if I've known the client for a while, I think that the amount of in person doesn't have to be as high because we built a relationship between the client or stakeholder and the company.

Speaker 1: That makes sense. Any other relevant situations that you encountered with your clients that you think I have not touched on?

Speaker 2: Not too sure. I think you've covered pretty much everything.

Speaker 1: Perfect. Well then for the next phase we're going to shift to your opinion on in person versus remote work. So, the first question is in your opinion, what are two benefits and two drawbacks of in person engagements?

Speaker 2: Two benefits I think in person allows you to network a lot easier. I think in person also, I feel that our brains are naturally programmed to associate environments with certain things. So when you're in an office, you program your mind to work, as opposed to when you're in the house, you feel more relaxed. Two drawbacks of being in person is that when you're in the office, the work life balance sometimes can be jeopardized because if they're trying to complete something and you have things that need to be done throughout the day, it can be tough, especially family matters. So that's one and two, I feel that you can get more done at home than

when you're at work in the office because the person or employee that's working is not thinking about leaving to go anywhere with because they're already in their home. So I think that, you know, the drawback would be that you can't get as much done in person as you could when you're at home because you're not pressed for time to return home.

Speaker 1: That makes sense. So then how would you like to structure in person engagements? Do you think it has to be Monday through Thursday or is it more that you're meeting with a client in an office room or are you having dinner with them? How does the ideal structure look like for in person?

Speaker 2: I think a conference room can be helpful to draw in the engagement, but I feel that the meetings in person should be to present things or if there are pivotal points of planning for. In between, I think that the client can save money and I think the company can save time if they just keep it remote. And then for the big milestones we show up in person to really talk it out.

Speaker 1: Okay. And then do you think that there are people that especially benefit from in person work?

Speaker 2: I think that new joiners benefit most from in person work, me speaking as someone who never worked in person since being at the company, I feel that, especially the new joiner could have met and networked with a lot more people. As we move forward within our careers, we all become different and positions as we get promoted and stuff. And I think that work can be very helpful for your growth. So I definitely think new joiners were affected the most by the in person lack of in person.

Speaker 1: Okay. And then are there any tools, activities, or methodologies that you like to use in in person engagements?

Speaker 2: Nothing in particular.

Speaker 1: So then now I'm going to ask you pretty much the exact same questions about remote work. What do you think are two benefits and two drawbacks of remote work?

Speaker 2: So, two benefits of remote work. I feel that when you give people more time to spend with their families it allows them to work better. So I think that's good. I also think, you know, saving money for the company. I think that by allowing people to work remote, you can lessen the expense, especially in a company that pays for travel expenses, that's one less expense that has to be worried about. So those are two pros. Two to cons can be lack of networking, because, like I said, that is important for new joiners and just people in general. I feel that people need in person interaction. I think that there needs to be a balance and also another drawback of remote could be, I feel that there could possibly be more structure when it comes to an in person as opposed to a virtual working environment. So yeah, I think that could be a drawback because if the individual that's working remote does not have great time management skills, it can pile up more work as opposed to being in person and kind of being in a setting where you're held accountable.

Speaker 1: Got it. So then how would you like to structure remote engagement? Do you think it should be voice only, camera? Do you try to make it interactive?

Speaker 2: I feel that everyone should just have a choice to either be on camera or voice, but I feel that everyone should be expected to engage in whatever way they feel comfortable. Everyone should contribute to the conversation to build relationships. I think that's central just so that even if I don't see your face all the time by me hearing you or talking to you a lot, it feels as though I kind of know you in a sense.

Speaker 1: That makes a lot of sense. So do you think that there are people that especially benefit from remote work and if so, who's that?

Speaker 2: Yes. I think that people with children benefit the most from working remote and just people who have situations in their house that they need to tend to. I think it can be very helpful because it's kind of allowing them the flexibility to take care of those things while also being attentive at work.

Speaker 1: Got it. And then what tools, activities or methodologies do you particularly like to use in remote engagements?

Speaker 2: In remote engagements? I think it's important to spare conversations in directions that, all parties have to participate. I think that by doing so you have everybody's input and you know that everybody's engaged, even if it's not a huge task by splitting it up and assigning collaborative effort, it can force a sense of networking virtually. So I think that is a really cool way to foster relationships virtually, collaborative work, doing side calls, doing interactive things too that maybe help team building like playing games or stuff that doesn't seem so pressing. And just showing that we are humans too, and that you always take a pause maybe before a call starts to ask everyone how they're doing just like smaller interactions where you can build relationships virtually like that I think is very important.

Speaker 1: Got it. Thank you. So now we are pivoting again and I'm actually going to ask you questions about the future workplace and your opinion on that. So how do you foresee projects to be structured going forward?

Speaker 2: Okay. So me personally, I actually think projects can remain virtual for now because it's been working for us as a company. And I think it's been allowing us to save money while still serving our clients. So it's kind of a win-win. Yeah, I think moving forward we can stay in the virtual setting.

Speaker 1: Okay. And then would that also be your personal ideal work structure, a hundred percent remote?

Speaker 2: Yes. However, I would suggest, I would probably say maybe 90% or remote. I would suggest there be events or things coordinated for employees to get together and network.

Speaker 1: Perfect, that kind of leads into the next question which is what do you foresee we do with our buildings? You know how we have innovation hubs and offices, what should we, or what do you think we will do with them?

Speaker 2: I think what we can do is, are you talking about in terms of the space being not used for working?

Speaker 1: Yeah. Or how should it be structured so that you would actually use it again?

Speaker 2: Okay. So if we want to use it, I say we can outsource the buildings for some of our clients to do work in them. The COVID 19 pandemic happening, I feel that a lot of people don't feel as comfortable in close proximity. So I feel that we can structure it by allowing there to be more space too, between everyone and still having, I guess, that together feel but also being safe where everybody's tested regularly or vaccinated. And there are measures taken so that everybody sanitizes their hands consistently and the buildings are kept in a clean way that we can reduce the amount of germs.

Speaker 1: Got it. And then you kind of touched on this one as well, but what do you think we should do to continue to strengthen our company culture? Should we have office days, Christmas parties, do you think sending gifts home to people's residents would help, what do you think would help to foster this?

Speaker 2: Yeah. So I think that things that can help foster could be, I think like you said, maybe Christmas parties, dinners with people who share commonalities within groups, whether it be projects, ERGs [employee resource groups], with your career counselor, I think the people who you share groups with that directly impact your career, or maybe impact the industry you're trying to get into or already into. I think

there should be events that allow for networking. Just talks maybe, some coffee chats and things like that that can be in person I think would be helpful.

Speaker 1: Okay. And then I have three final questions for you. What's your number one advice that you'd give a person currently managing a client engagement.

Speaker 2: So for a person currently managing a client engagement, number one, I would say, listen to the client. However, the client came to us for a reason. So take it with a grain salt, because sometimes the client doesn't know what they need or want, but they'll tell you what they do need or want. And sometimes they'll find out that it was something else that was the issue or the one thing that can help so listening to the client, but making his or her best decision for the project as a whole.

Speaker 1: Okay. And then what makes a client engagement a success in your opinion?

Speaker 2: I think what makes a client engagement a success is either meeting or exceeding the expectations of the project, because I think there's direct correlation between that and furthering the relationship to other work.

Speaker 1: Okay. My final question for you is, do you have any last pieces of advice or thoughts that you would like to share on this topic?

Speaker 2: I would just say that, you know, this is a very important topic because we're in the midst of a change and a shift in the dynamic of how the world is working in the corporate space. So I definitely think that with this change and shift, I think corporate America should, and they have already, but they should continue to take strides to shift with the way technology has improved, just to make more of life balance a lot easier, whether it be hybrid or a hundred percent virtual, I think by utilizing technology to make work-life balance better, you get better productivity from your employees.

Speaker 1: Perfect. Thank you so much.

## **Appendix B5: Analyst 5**

Date:

Speaker 1: Thank you for agreeing to the interview. I'm conducting these interviews for my DBA research and would like to ask you a few questions about your experiences in varying workplace settings. The interview will last about 30 minutes. Your consent will be recorded.

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay for you?

Speaker 2: Yeah.

Speaker 1: We're first going to talk about your experiences in the workplace. How long have you worked in consulting?

Speaker 2: About a year.

Speaker 1: How many years have you worked in person and how many remote?

Speaker 2: Just for this job?

Speaker 1: In general.

Speaker 2: Probably about a year in person, counting internships added together, and then a year that's been mostly virtual.

Speaker 1: Have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: Yes, to an extent, but it's hard to say because my work in general has been a different type of work.

Speaker 1: If you don't have any, that's totally fine too.

Speaker 2: I definitely have different habits, but it's more of just small things like snacking throughout the day instead of eating during lunch or that kind of thing.

Speaker 1: Okay, that's perfect. All right then, what's your preferred way of engaging with coworkers? Would that be remote or in person, maybe a hybrid. Do you have an idea?

Speaker 2: I think hybrid, I like meeting my coworkers in person and having met them in person but having the flexibility to work from home.

Speaker 1: And then is that also how you prefer to engage with your clients?

Speaker 2: Yeah.

Speaker 1: Okay, in this next section I'm going to walk you through seven different scenarios that we encounter with our clients. They're all hypothetical but just respond to what you would like to do. There's no right or wrong answer. Think about how you would ideally engage in these scenarios. Scenario one, you're meeting a potential client and would like to explore if there's an opportunity for a new project. Who's your stakeholder and what level of seniority do they have and then how do you engage with them?

Speaker 2: I don't know, I haven't really had that.

Speaker 1: All right. Then next you're working on a proposal. Who's your target audience and how do you successfully close the deal?

Speaker 2: The target audience would be the stakeholders that are responsible for the program. And I guess closing the deal is providing them with a program that kind of fits both parties.

Speaker 1: Okay, and now you're actually kicking off a new project, who is attending the kickoff and how would you like to structure the meeting?

Speaker 2: All the stakeholders on both the client and the Consulting team side. And structure; I would probably go through key stakeholders, goals, objectives, timeline, work structure, that kind of thing.

Speaker 1: And then would you like to have this meeting in person or remote, if you got to choose?

Speaker 2: I would prefer remote.

Speaker 1: Now you are actually working on a project, on an ongoing engagement. How do you prefer to engage with your client, and do you think it varies by stakeholder?

Speaker 2: Yes, I think it varies a lot by stakeholder.

Speaker 1: Do you just remote call some, others you'd meet in person, maybe others you'd have dinner with, or how would you like to structure that?

Speaker 2: I'm not sure because I haven't had that much in person experience to see if I would like it. But I think maybe some of them in person, some of them remote.

Speaker 1: Okay. And then now you're at an important milestone during the engagement or at the end of one. How would you like to present your findings to your client and who is attending this meeting?

Speaker 2: I think it depends on the stakeholders again, but if we had done other events in person then in person, and people attending or all the stakeholders and teams that have worked on it.

Speaker 1: Perfect. And scenario six, you believe that there's a potential for a follow up project. How would you like to communicate that with your client and if they're different people, how do you communicate with your client versus the person giving the final sign off?

Speaker 2: I think again, it would depend on the stakeholders and the client. If you had been doing things in person, it all kind of depends on what they prefer, especially when you're trying to sell a new deal. If you had been doing things in person or if you preferred in person you could meet with them in person and then depending on how closely the stakeholders work together either in the same meeting or few different ones.

Speaker 1: And the final one. Outside of an engagement, how would you like to foster existing client relationships? Do you think it varies by level of seniority or how long you've known the client?

Speaker 2: Yeah, definitely. Do you mean like in person versus virtual for this too?

Speaker 1: Yes. Or even, is it emails, is it text messages? Do you have a camera call? What do you think is the most effective way?

Speaker 2: If you had been doing other things in person, then keeping it that way, but then I think like checkpoint meetings in person, as opposed to email, just because it's a little more of a, it builds the relationship a little bit.

Speaker 1: That makes a lot of sense. And then do you think there are any other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: No.

Speaker 1: Okay. In this next section we will shift focuses and talk about your opinion on in person versus remote work. In your opinion, what are two benefits and two drawbacks of in person engagements?

Speaker 2: I think a benefit is that you get to know your team members better and work together more cohesively and then a drawback is the time wasted on commuting.

Speaker 1: Got it. Do you have a second drawback or is that the main one?

Speaker 2: That and the flexibility of it. I know a lot of people prefer to work from different locations and even though I like the hybrid approach, there are more people that probably would prefer to be a hundred percent virtual.

Speaker 1: Then briefly describe how you like to structure in person engagements. Do you think it'll be Monday through Thursday weekly travels, do we need to do more special activities or dinners or anything like that?

Speaker 2: I think Monday through Thursday is a good structure. If there's travel involved then maybe like once a month or for meetings, like a hybrid approach.

Speaker 1: Got it.

Speaker 2: And then team dinners are always nice.

Speaker 1: Perfect. And do you believe that there are people that especially benefit from in person work and if so, who's that?

Speaker 2: Yes, and I think it depends on the person. People, if they have a lot of distractions at home, they're probably more likely to get more done in the office, but then it all goes the other way, probably there's people that will get more done at home.

Speaker 1: That makes sense. And are there any tools, activities, or methodologies that you particularly like to use in in person engagements?

Speaker 2: Not any specifically that I can think of.

Speaker 1: Okay. And now I'm going to ask you the exact same question about remote work. In your opinion, what are two benefits and two drawbacks of remote work?

Speaker 2: The benefits are you can work more flexible hours. Like if you wake up and realize you need to do something, you can do it immediately and not waste the time getting ready and commuting. And then another benefit is if you need to travel last minute for personal reasons or something like that, you could work as opposed to having to take off if your situation allows it. And then drawbacks are, if you have a lot of distractions at home, and then not being able to form as strong connections with your coworkers.

Speaker 1: Perfect. And then also please briefly describe how you like to structure remote engagement. For example, camera on or voice only, are you trying to make it interactive?

Speaker 2: I don't have a strong preference on camera on or off. And then a level of interactive, especially when you're getting to know people it's good, but then I think after you've, met them you can kind of do the things a little bit.

Speaker 1: Perfect. And do you believe that there are people that especially benefit from remote work? I feel like you already kind of answered that one earlier that with those who can get a lot done at home, right? Is there anything you wanted to add to that though?

Speaker 2: Exactly. like that or people that live really far from work and would have a really long commute.

Speaker 1: Perfect. And the final question for the section. Are there any tools, activities, or methodologies you particularly like particularly like to use in remote engagements?

Speaker 2: Not specifically, I've tried a few different tools, but none of them stuck out as things that I would always want to use moving forward.

Speaker 1: Okay. And then in this next section, we're actually going to talk about the future. How do you foresee projects to be structured going forward?

Speaker 2: I guess personally I would see like a mix of projects because it dependent on the preferences of different people and the preferences of the leadership that's making the decisions. I see probably projects returning to either hybrid or in person, like slowly over time, but always remaining, somewhat virtual and some projects staying that way.

Speaker 1: Makes sense. And then personally, what would be your ideal work structure?

Speaker 2: My ideal would be a hybrid, in person or traveling, but not every week. It allows for the flexibility of working from home, but also meeting your coworkers and clients in person.

Speaker 3: Perfect.

Speaker 2: At least at me point.

Speaker 1: That makes sense. And then what do you foresee we do with our buildings? You know, all the innovation hub and offices and such that we have. How do you think we should use them?

Speaker 2: Yeah, I guess our situation is also not like a lot of companies because it's always kind of been structured for working at the client site through the week and it's not like everyone has a cubicle or something like that, that a lot of companies have. I think like the innovation hub spaces are still valuable and the in-person working spaces still may be used, but probably to a lesser extent. Maybe just making them a little bit smaller.

Speaker 1: Got it. And then how should we continue to strengthen our company culture? And should we have more region days or office days, Christmas parties, or do you think we should continue to send gifts to people's home? Do you have any idea on what would help you strengthen yours or make you feel more connected to the company and strengthens the culture?

Speaker 2: Yeah, I've been to a few in person events that I think have strengthened the cultures. And maybe have in person days kind of optional but suggested or something along those lines.

Speaker 1: Perfect. And then we have the final section. I have three more questions for you. What's your number one advice you'd give a person currently managing a client engagement?

Speaker 2: I think when it comes to the virtual versus in person and when you're managing with a client, you kind of have to notice what they prefer and try to adjust your ways of working that it's in line with their preferences to the extent that you can.

Speaker 1: Perfect. And then what makes an engagement, a success in your opinion?

Speaker 2: I think just a project where this client is happy with the results and the team feels like they work together well and meet their goals.

Speaker 1: Okay. And then the final one, do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: No, I don't think.

Speaker 1: Perfect, thank you.

## **Appendix B6: Consultant 1**

Date:

Speaker 1: I am conducting these interviews for my DBA research and would like to ask you a few questions about your experience with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: I do.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay with you?

Speaker 2: Yep, perfect.

Speaker 1: In the first section, I'm going to ask you about your experience in the workplace. How long have you worked in consulting?

Speaker 2: In consulting? So four years.

Speaker 1: Perfect. And how many of those years have you worked in person and how many remote?

Speaker 2: About two, actually about split in half at this point.

Speaker 1: Great. And have you detected any changes in yourself since primarily working from home?

Speaker 2: Any changes in myself?

Speaker 1: Yes. Any new habits that you've developed since you've changed work location?

Speaker 2: Yeah, one thing is I actually spend significantly less time outside but obviously it's because I'm sitting in a single place, whereas before I spent a lot of time going from meeting to meeting or getting random coffees with colleagues or lunches or whatnot. So as far as myself, I spent significantly more time indoors now and behind the computer as well as

hours of work pretty much turned to 24 7. Before it's like you leave the office, you're done, you close your laptop, you don't open it again until you come back, you might answer some emails on your cell phone. Whereas now it's like your laptop is always open. So it's a bit of a constant way of working, if that makes sense?

Speaker 1: That makes a lot of sense. And slightly related to that, how do you prefer to engage with your coworkers? Is it those coffees that you mentioned or would it be remote calls?

Speaker 2: I definitely prefer in person coffees like chats. It doesn't even really matter if we could stand there and drink water. I think in person gives you a lot more understanding in terms of communication, right? So now it's no longer, just audio communication. There's no body language and greater emphasis on people's voices and interpretations on how that's transmitted as well as realtime reactions. You can't get reactions or gauge them as accurately when you can't see the person or you are not really sure how they're reacting when it's just through a small screen.

Speaker 1: Right. And then this is also how you prefer to engage with clients, in person?

Speaker 2: Definitely in person with clients as well. I find that just general conversations are a little easier to be had. People are less distracted because you're constantly connected on multiple devices as well as at home. Like your significant other or your pet or something could also be asking you something, so I'd say in person's also generally what I like more.

Speaker 1: Okay. And then in the next phase, I'm going to walk you through seven different scenarios on how we engage with our clients. And I'd just like to hear about how you ideally respond to the situation. So scenario one, you're meeting a potential client and would like to explore if there's opportunity for a new project. Who are your client stakeholders or what level of seniority are they and how do you engage them?

Speaker 2: That would probably be around the SVP level at least in terms of current engagements, previous ones, maybe closer to the vice president level and I would frame it as just a general conversation at first and then trying to figure out what the actual pain points are, because, you know, you could think something is a potential opportunity for an engagement when in reality it could be a simple breakdown of communication or misunderstanding of alignment and goals. So generally, that would be probably around the SVP or VP level. I first try to understand what it is we're trying to solve and what the problem is because I think people are generally more receptive from potential consulting engagements when it's more of a co-creation type approach, as opposed to, you know, you just go in there and say; I know you want to stand up this program and X, Y, and Z are currently not capable of meeting those needs. And you could open the door up to a broader RFP to where other consultancies may still be in the running as opposed to finding out what the true problem is.

Speaker 1: That actually feeds very nicely into the next phase. So now you're actually working on this proposal. Who's your target audience now and how do you successfully close the deal?

Speaker 2: So working on the proposal you definitely want to make sure you have all of the right people internally and the resources internally that you need. So you might not know anything about it, but the ability to frame up the problem we're trying to solve is critical and finding the resources internally to help solve that problem. This would be the bigger internal dynamic, of course there's also client account teams and folks on the ground who understand more of the business context than I might. So I'll reach out to any of the internal people who I know that I could lead on and then framing together what the proposal would be from things that I've heard from the client, as well as things that I've found internally to help solve those.

Speaker 1: Perfect. And now you won this project and you're kicking it off. Who's attending the kickoff and how would you like to structure it?

Speaker 2: I definitely would like to have the folks attending, the executive sponsors and who the key buyers are. Potentially, if there are any coaches or additional folks on the client side who helped bring it to where it is, like to bring us to the win as well as anyone who we'd be working with more directly, any work stream leads. On our side, I would definitely include the managing director, like the key managing direct. the project lead which probably be senior manager and then a manager or whoever the next person included would be. I try to keep it relatively small. So, you know, three, maybe four people from Accenture, maybe up to eight people from the client side to try and keep the group focused. And the agenda I would align on a brief introduction of who everyone is, that who doesn't know each other as well as are aligned, the overall program goal, objectives and what the current state is and what are the next steps. So not sure how much time you have, but that is what I would probably try to of get out of that meeting, we're all on the same page as to why we're here. We all know what's currently happening in this space and these are the next steps and who's running them down to get moving.

Speaker 1: And do you think this is in person or remote?

Speaker 2: Ideally in person, but these days it's always remote.

Speaker 1: Right. And on an active project, how do you prefer to engage with your client? And do you think it varies by stakeholder?

Speaker 2: I generally prefer in person, but it definitely varies by stakeholder. There are people that I've engaged with prior to being remote, who I've engaged with in person. And I've actually found that it's better to engage with them remotely, as opposed to in the office. But that being said, there are folks that I've only worked with remotely, who I think I

would get a much better partnership working with them if it was in person. So I think it just really depends on who the client is, what the goals of the program are, but it's been a mix of both. Sorry. Was there another part of the question that I didn't answer?

Speaker 1: No, this is perfect. And then thinking about important milestones or the end of an engagement, how do you like to present your findings to your client and who is attending this meeting?

Speaker 2: That's a good question. For the readout, I like to include where we started with and the progress we've made today. So, we've been able to accomplish X, Y, and Z. We think long term this is going to enable success and growth or new market entry, whatever the case is to highlight not only what we done so far, but the roadmap and path we think you'll be on because of this. I'd like to sprinkle in some areas of potential additional support, whether it be from us or somebody else and whether or not it's even needed. It could be a simple product launch, like, Hey we helped you launch this product, we've helped set up all sorts of customer service and problem resolutions, now it's run and maintain. We helped you build a long-term product roadmap. Let us know the next time or it could be something along the lines of, we helped you launch this product, but there's a significant reduction in the number of potential customers we thought we would have. So maybe we need to realign what the product or feature roadmap looks like. So depending on what the next steps are that could change, but for the stakeholders, it would be all the folks that I had in the kickoff plus any additional senior level leadership that's been engaged. So if there's SteerCos involved that, the client's bosses, I would want all of the senior leadership there as part of it as well.

Speaker 1: Perfect. And then you believe that there is potential for a follow up project. How do you like to communicate that with your client and if they're different people, how do you communicate with your client versus the person giving the final sign off?

Speaker 2: So if I think there's follow on work I definitely try to illustrate the areas and why it needs to be done as well as what the expected benefit or return is. Generally if it's the main client you've been working with who would be the prospective buyer or, you know the client spark any sort of extension. Hopefully that message has been received over several weeks, if not months, depending on how long the engagement is, because you would think that on a day-to-day basis, they would see the same issues that you're raising and have a similar long term view as what you're proposing to them. However, if it's another client that you may not work with directly, I think it's really critical to have the client that you're working with on more of a day to day basis backing you on that position. Because as I was saying, you would think that you and your main client would be on the same glide path, seeing the same stuff. And it would probably be beneficial to have somebody on the client side also preaching the things that you're saying are areas of improvement because then that client is now more of a coach, like an internal coach to help sell that future engagement.

Speaker 1: That makes a lot of sense. And then outside of engagements, how do you foster existing client relationships?

Speaker 2: Well, I'd like to be real most of the time and just always start with a little bit of small talk, see how folks are doing. Maybe there was a big pressing meeting that everyone was part of that you spent a lot of time leading up to over the last few weeks might be good to spend a couple minutes debriefing on it that; Hey, what did you think about the symposium, or do we have any clear next steps or guidance in terms of X, Y, and Z? I

generally like to keep, depending on the client, I like to keep the conversation focused on areas of interest to them personally and then that's kind of how I built client relationships, if that makes sense.

Speaker 1: That makes a lot of sense. Thank you. And do you think there are any other relevant situations that you encounter with your clients that I did not touch on?

Speaker 2: I don't think so. I think for the most part, anything outside of that wheelhouse would not be expected in the norm. I think that those are kind of the primary ways that we engage with clients and anything out outside of that, like whether it's more conflict resolution type stuff or if you have folks on the team that aren't really meshing well with the client side, like those kinds of things I think are significantly more nuanced and don't happen very often. So overall I'd say these are probably the main areas of focus in a consulting environment.

Speaker 1: Perfect. So then we're going to shift focus and talk about your opinion on in person versus remote work. In your opinion, what are two benefits and two drawbacks of in person engagements?

Speaker 2: In person and engagements? One, I think there's a better understanding of stakeholders and what they really care about. Does this marketing person really care about what the comms is doing or do they really want to just stick the sales and marketing? Like there's a lot of information you can just pick up from being able to be in the same room as another person that I think that is probably the biggest drawback so far. It is literally just the information that you can naturally gather from sitting and seeing how everyone is interacting, that's a big drawback. Now, what else would be a big one? I just think the natural breaks throughout the day are extremely important. Allow you to refocus on the core objectives. What are the things that we really need to focus on happening or getting

done right now versus some noise that might build up in the background. Part of what I'll say why it's really nice to be in person is now that you're connected 24 7, it's like a never ending list of asks from people from all over the place. And it creates a lot of noise and it can be really difficult to prioritize what is extremely important that I get done now versus something that I can put on the back burner for like two weeks. Whereas if you spend a little less time being connected and more time just being out and about, I think it's a little easier to sift through that information. What was the other half of it? What are two things about not working in person?

Speaker 1: No, just the two drawbacks and benefits, but I think you touched on the main benefits on drawbacks, right?

Speaker 2: Yeah, I think so.

Speaker 1: So then how do you like to structure your in person engagements? What do they look like? Is it Monday through Thursdays? Is it weekly travel, dinners, special activities?

Speaker 2: That's a good question. So before working remotely became pretty much the normal, Monday through Thursday was nice. Client dinners probably every other week or so, sometimes it can be a little cumbersome or maybe monthly. Generally client dinners would have our MDs there as well. Maybe the main client plus two or three other people, depending on how big the client team is we're working with. I think Monday through Thursday and then Friday home office works pretty well, although having seen how much could be done in a remote environment, I think going forward whenever we do start traveling again, what would make more sense is being at the client site maybe every other week, Monday through Thursday, or maybe even quarterly? I guess it would just depend on the engagement, but I don't think the weekly travel grind is really necessary.

Speaker 1: That makes a lot of sense. And then do you think there are people that especially benefit from in person work and if so, who is that?

Speaker 2: Who especially benefit from what work?

Speaker 1: In person.

Speaker 2: In person? Honestly, I think it would be us and anyone else whose career has a lot to do with having interpersonal skills. The ability to tell a good story and communicate with everyone in a way that they're receptive to. So consultants, definitely sales folks, anyone in customer service. I would say any job or role that has you interacting with people more often, and then maybe catering your responses depending on how they're reacting to you probably benefit from in person.

Speaker 1: Okay. And are there any tools, activities, or methodologies that you particularly like to use in in person engagements?

Speaker 2: In person engagements? Workshops I haven't had to lead a workshop remotely yet, and I really don't know how it would go because that's something where you've got a bunch of whiteboards, you got some sticky notes, everyone's eating, we're going to small groups and breakout sessions and things like that. So I'd say for in person that's a pretty big one. So the tools we would be using whiteboards. I think we still use PowerPoint regardless of whether it's in person or remote, but generally if it's in person it's closer, just pull the PowerPoint up on the meeting screen, and then we'll have someone flick through as we go and then whiteboards for any additional ad hoc information we need to talk about or think through. Those are pretty much the tools I would use in person.

Speaker 1: Perfect. Now I'm going to ask you the exact same questions about remote work. So what are two benefits into drawbacks of remote work?

Speaker 2: Remote work, the big benefit is being able to to put your head down and just crank work out sometimes without having people bother you as weird as it might be, but like, no one's coming up to you. Someone might ping you or something like that, but you can turn on some music and if your calendar's cleared, you can just hammer out information or hammer out some slides, work through data, whatever you need to do. That's pretty nice that you can literally unplug yourself from colleagues in that way. The other pros and con from being at home, I mean there's a pretty readily and accessible supply of water and coffee and food at my house. So that's really nice. Because you know, sometimes you don't have time to make those runs, have to skip lunches or you may have only had like one bottle of water throughout the entire day because you're at a client site and you don't have access because you're stuck in a conference room. So there are some really nice pros to working home. And also if you have an appointment or something you're not taking off like half the day, you're just hopping in the car. "I'll be back home in an hour." That is definitely a plus is being able to remotely pretty much anywhere, especially if you're traveling. I have a lot of friends who traveled overseas and just work their same hours. It's just really dark when they work.

Speaker 1: That makes sense. Do you have any drawbacks you would like to add or are you okay?

Speaker 2: Drawbacks is, I don't know if I mentioned before, but there can be a lot of noise that you can kind of shut out from the office space. You are also potentially introducing noise from your home environment. So that is a con that I, I think some people kind of forget. I don't have children, so it's not extreme for me, but I do have a significant other, I do have a dog and sometimes my dog will come and jump on me and you know, it is what it is.

Speaker 1: Perfect. And then how do you like to structure remote engagements? Do you think it'd be voice only, camera, screen sharing, making them active?

Speaker 2: I like to do a combination, definitely screen sharing if we're talking through materials. I like to have materials or content for people to visualize and look at as we walk through or have meetings with clients. So sometimes there is no need, right? Like sometimes we're just having conversations, making decisions that are on content. We've already viewed things like that. As far as like cameras go, I do think people get fatigued with cameras. That's just another thing that they have to think about throughout the day. The way I like to do it, usually is if I'm in a speaking role I will turn my camera on when it is my time to speak or like leading up to I fade in, fade out. Just so then people can naturally see when I'm going to stop speaking. Oh, is he transitioning to another topic? And it's not so much just like, oh, I think he's done talking right now.

Speaker 1: That makes sense. And then what people do you think, especially benefit from remote work?

Speaker 2: Introverts for sure. Introverts and then people in certain roles. I would say anyone who is working in more of a non-client facing job. So if your job is mainly heads down, data analysis or content creation or you create comms plans or marketing plans and you don't really need to spend a lot of time gathering client input or creating a sense of alignment between different organizations. I think there's a huge amount of benefit to folks that are not in a customer facing role.

Speaker 1: Perfect. And any tools, activities, methodologies you like to use in remote engagement?

Speaker 2: I mean, pretty much all of Microsoft office? We use Teams for all of our conversations, PowerPoint, Excel. I haven't used them, but other people have done workshops with Mural or different other software. I haven't been in a virtual workshop yet, but those tools are out there.

Speaker 1: Awesome. And in the next piece, we're going to talk about the future of work. So personally, what would be your ideal work structure?

Speaker 2: Ideal for me probably would be a week to two weeks remote a week at the client site. So a bit of a blended travel but home model. Maybe like three weeks at home, one week a month is at the client site. I think then you can kind of go into a little bit of a cadence that feels natural for people. Everyone would still see each other all the time via remote meetings and all that, but then there's an opportunity for everyone to get together. You can take advantage of it. If there's a lot of meetings that would benefit from in person, you could plan to do those during that time when everyone would be together. It's also a good time to build a little bit more of a deeper relationship with clients, as well as the teams that working remotely with all of your colleagues does not. At least in my experience that does not create as deep of a relationship with each other as you do working together side by side. So I think ideally there would be at least some sort of in person engagement and I think once a month for a week is probably fair for 95% of use cases.

Speaker 1: And then do you think this is also how we're going to structure projects going forward?

Speaker 2: I think project structures are going to be much more dependent on a project level than they ever were before. I do think the majority of structures are going to go to some sort of blended model, whatever it'll be, who knows if it's going to be every other week, once a month, once a quarter. I don't think any clients are still going to want to put the expense costs for every week of travel, especially if they don't have their own employees there every week.

Speaker 1: Perfect. And then do you think there's anything we need to do to continue to strengthen our company culture? Is it office days and Christmas parties, or should we send more gifts or anything like that?

Speaker 2: I think we should focus on having more in person engagements. Well, maybe not more is a good way or the right way to put it but having them be more meaningful. So say there's only a few a year, but create these events in a way that would want people to get out there, be part of it. So like when I was in Philly, they would do a day at the museum and you could bring your entire family. Those are the kinds of events that I think are really cool and get people out there and engaging with their colleagues at a local level or like the Christmas holiday parties are great and those are always really well received when done. And then even having remote meetups, but where you send each other gifts or something. Say we're going to do a wine and cheese tasting, or we're going to send each other charco boards and we're going to talk about X, Y, and Z topic. Maybe, you could pick anything under the sun, but I think having these just be a little more targeted and feel more meaningful and less like there's a whole sea of opportunities to meet up with each other, but none of them really feel meaningful, if that makes sense.

Speaker 1: That makes a lot of sense. So final question, do you have any other thoughts or opinions on the matter on the topic that you would like to share?

Speaker 2: No. No, I think I've said my peace.

Speaker 1: Awesome. Thank you so much.

## **Appendix B7: Consultant 2**

Date: Gaby C.

Speaker 1: I am conducting these interviews for my DBA research and would like to ask you a few questions about your experiences with varying workplace settings at settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay for you?

Speaker 2: That's great.

Speaker 1: First I would like to hear about your experience in the workplace so how long have you worked in consulting?

Speaker 2: Okay. I've worked here almost two and a half years. I started in November of 2019.

Speaker 1: Perfect. And how many years have you worked in person and how many remote?

Speaker 2: I worked about six months in person and then I have been remote the rest of the time.

Speaker 1: Okay, and have you detected any changes in yourself on new habits that you've developed since primarily working from home?

Speaker 2: Yes. I think it's been such a transition in terms of habits. I have more of a habit of being closer to my computer all the time. I remember pre-COVID, I would leave work at maybe 5:00 PM and just log off and be done for the day and not really pull out my computer at home for any reason. But since the pandemic feel as if I just have the habit of working longer hours, responding to my Teams really at any time, and even if I have to run an errand or anything else, being very restricted to my phone or the Team's app in order to be able to respond. I think on the other hand, some positive habits have been just being able to do more life and fit in some other errands or things into the day and make more time for that. But it definitely has come with a cost of just my own barriers to work, I think, diminishing.

Speaker 1: That makes sense. And then do you have a preferred way of engaging with your coworkers? Would that be a remote, in person, hybrid?

Speaker 2: Definitely in person. Well, a hybrid I think could be good just because now that we've all felt this way of being able to just wear pajamas and work from home, it is nice in some ways, so having a balance. But I do feel as if we work best when we're able to see each other and be together and all of that.

Speaker 1: And then is that also how you prefer to engage with your clients?

Speaker 2: Yes, it's much nicer to meet them in person.

Speaker 1: Okay. Thank you so much. So in this next phase of the interview, I will walk you through seven different scenarios and would just like to hear how you would ideally respond to the situation. So scenario one is you're meeting a potential client and would like to explore if there's an opportunity for a new project, who's your client's stakeholder and how do you engage them?

Speaker 2: Okay. And when you say who's your client's stakeholder?

Speaker 1: Like what level of seniority, is it an executive? Is it someone slightly lower?

Speaker 2: And this is just my current position of work, correct?

Speaker 1: Correct, but still an ideal response. Do you want to meet them in person? Is it an email? How do you engage with someone that you don't know about a potential project?

Speaker 2: Okay, good point. I think initially it would be some kind of email correspondence leading to a meetup or whatever else. And I can think for example, I've been trying to stand up a partnership with a nonprofit here in town, and it started by knowing that client personally and volunteering alongside them and forming a relationship that way. And they're the head of the Denver and Colorado efforts for that nonprofit. And so just naturally from talking to him about the work they were doing, it morphed into this idea and problem

solving of, how could Accenture help with that? And then from there, the follow up was an email and further meetings and those meetings have taken place virtually just because that's the world in which we interact for business. But I don't think it would've gone as smoothly had we not met in person and had just a knowledge of who each other is. All of that first.

Speaker 1: I think you actually have touched on the second scenario too. So if you're working on a proposal, how do you successfully close the deal? But it sounds like it's email follow ups and keep staying engaged, correct?

Speaker 2: Yes, definitely.

Speaker 1: Perfect. And then scenario three, you are kicking off a new project. Who is attending the kickoff and how would you like to structure that meeting?

Speaker 2: Good question. The kickoff would definitely include all relevant parties and would walk through the general idea of what's the question at hand, how are we going to be solving for it? What's the plan ahead in order to solve for it? And really the only way I feel as if I've seen that take place has been virtually. So we'll have some kind of big meeting and maybe we have some interactive features such as Minty polls or ways to engage the audience and call into action. But certainly sending a, a pre-read beforehand and follow up emails and having the meeting itself be purposeful in terms of even if it is virtual, which most likely it will be. We have ways to engage with whoever's listening in.

Speaker 1: This is perfect. And then scenario four during an active project, how do you prefer to engage with your client? And do you think it varies by stakeholder?

Speaker 2: I think it does vary by stakeholder and I've been so appreciative of the in-person interactions I've gotten with even some of the clients. Those conversations just couldn't have happened in that way had we only been virtual, but I have been appreciative of,

especially with the project I'm working on, where it's global people are all across time zones that we just have to be virtual. We have to be meeting online in order to incorporate everyone and really offer convenience across the globe to meet up. I think my preferred way is just an old fashioned in person meeting with a PowerPoint up on screen. But as time has evolved, I've learned that it can be good to be virtual just because you can do so many things behind the scenes when you're on mute or off camera such as working on other deliverables, making edits to the slides, taking notes that I actually do prefer in some ways when we have just a larger team and lots of different roles within the meeting.

Speaker 1: This is great. And then if you think of an important milestone or the end of an engagement, how do you like to present your findings? And who's attending this meeting? Is this the traditional meeting room and PowerPoint on the wall meeting? Or do you think it's different?

Speaker 2: I think it is different. I have really only seen a big wrap up meeting virtually, but it has been really fun in terms of how everyone can be engaged with their own workstation. And so for example, we had a big kickoff or not kickoff, but just kind of, let's talk about the findings meetings at one client. And the way we were able to conduct the meeting itself was far more interactive with different Mural boards than almost a game show like tactics. And I just haven't seen it done in person because I've only been here mainly virtual, but I saw the ways in which having all these different tools to help everyone be part of the activities and the learning experiences ultimately hopefully led to further retention of the information we were sharing at the end. And I think it also provides a good opportunity for those key people to be on camera and come off mute and provide their input. But there are multiple ways of providing input, not just verbally, but now

through these virtual means, there are so many more that even the people who might not necessarily speak up in a traditional boardroom are able to provide their input and feedback via even anonymous polls or whatever else.

Speaker 1: Awesome. And then you believe that there is potential for follow project. How do you like to communicate that and if they're different people, how do you engage your client versus the person actually giving the sign off?

Speaker 2: Oh, that's a good question. I think it's hard because I really have seen everything just done virtually and we have to make sure we schedule occurring virtual meetings and regroup on our own to come back to those meetings with ideas of how to move forward. But I would say, I would guess that my preference in a future state world would be building even more of those personal connections person with the client so that when the time comes to extend, we're able to just have a real honest conversation about it, not something that is so manufactured or formal, which is often how a virtual meeting can feel when that's been our only means of connecting. So I think in terms of follow on and in the same way, it felt like that human connection was so important to start the work. It also feels important in the further kickoffs and starting next phases of the work to ensure that they really feel as if this is beneficial to them. And we are making sure that we're hearing what they need and responding to that well. And sometimes I think that candor just happens more freely when people are in person together.

Speaker 1: Perfect. And my very last scenario, outside of engagements how do you foster existing client relationships?

Speaker 2: Good question. I think it definitely depends on the medium in which you're interacting, but I would say on virtual spaces, it's been important to have that time of just talking or making a little bit of conversation here and there, maybe at the beginning of a call as

people or logging on. And being able to, if they say something about how life is really going, maybe ask a little bit more into that or share a little bit more into that, where they realize that we are humans too, and that they see that we acknowledge and are aware that they're humans as well and have lives outside of this computer world. I think it also comes down to just building trust and continuing to deliver great, consistent timing and work that they continue to feel as if they're able to rely on us and bring their opinions, and that we'll respond well to that and incorporate things and challenge them on things, that it's more of a partnership. So I think the work itself speaks for itself. And then I would say some of those in person interactions, if you're able to have them of just a happy hour or some kind of event that you can go to and just talk to people about life, and there's such a difference when someone knows a little bit more about who you are, or a little bit more about who they are not just how great they are at coding or whatever else. So that's my general take.

Speaker 1: This is great. Thank you so much. Do you think any other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: Trying to think, not really. I mean, there are just so many emails that go back and forth and those can be so important when there are fewer touch points between different people. And then it has been interesting to see how different teams have approached client relationships differently. For example, some teams have allowed more of the less senior people to be vocal or to meet the clients while others have tried to limit the amount of relationships the clients have with Accenture, so that I think they're able to build even deeper relationships, but I see the pros and cons of both. So I think even in terms of what's the hierarchy or how many relationships are too many relationships to

be building out with the client is something I never would've thought to question, but have since seen and learned from being on this most recent project.

Speaker 1: Great. Thank you. So in this next phase I'm going to ask you about your opinion on in person versus remote work. So in your opinion, what are two benefits and two drawbacks of in-person engagements?

Speaker 2: Okay. I would say benefits is number one, is all of the water cooler talk, essentially just being able to get to know one another past a surface level and just have more have more visibility into what people are doing on a day to day for training purposes for simply just awareness of seeing how hard someone's working and that you might be able to step in and take something off their plate, or just also being able to because you'll see how the pace of things is going, log off earlier or call it a day because you can see that everyone's kind of in the state of not having so much to do. You just have to even the load. I would say drawback number one is that it just takes more time to get ready for work, to show up, to have all these kind of non-verbal skills and professionalism tactics as well, like dressing up nice and looking presentable and engaging even with facial expressions and vocal tone. And then second, a drawback can be not being as efficient that more time is spent interacting or moving around. And because of that or training or walking and looking over someone's shoulder, talk to them, ultimately leading to less productivity on just being able to plug in your phone and listen to music and just get things done. So I do think a drawback is productivity.

Speaker 1: Could you then briefly describe how you would like to structure in person engagement to better runs these pros and cons? Is it Monday through Thursday? Is it weekly travels? Is it special occasions and dinners?

Speaker 2: That's a good question. I do think it's hard when so much of our company works so widely across the US where we can't always just come in for a few days and then be home for a few. It ends up being a week's time that we're in person. And then other weeks' time that we're not where I almost think, as you kind of mentioned, it's better to within any given week balance the time between in person and remote for, in terms of product, but also relationship building. I've really liked the model of one of our retail clients, where Monday, Wednesday, or Tuesday, Wednesday, Thursday, they're in person, but then Monday and Friday they're remote or maybe even just two days a week being in person. And those days will be a little busier in terms of meetings, but that ultimately will be worth it for relational means. And then you can balance days where you might not have gotten as much done because you're in meetings in person with the days that you're virtual. So you're able to just crank things out. I do think that's difficult with travel and different client locations. And so with that being said, I do think just a balance is good of both virtual and in person.

Speaker 1: Okay. And do you think there are people that especially benefit from in-person work?

Speaker 2: I do think it's the less senior resources and certainly clients. But at least on my most recent client, it can feel as if when we are less senior, we just aren't in so many meetings and almost lack that context. And sometimes it can be nice to be in person because we get more visibility into the meetings that are going on, that we just simply never even know about. Or we at least can feel a little bit closer to the client because we've seen them and met them where a lot of times we're kind of kept in our own silo of just supporting the more senior leadership on projects. And then finally, I think for training purposes as well the less senior resources benefit because they can sit down and quickly just say, Hey, can you help me with this? Where sometimes virtually miscommunications can happen or it's

just harder to explain for a senior resource, so that's where I think there's a wide benefit there. But I'm sure the people who are actually owning their relationships with the more senior folks really also benefit as well in that they're able to form those connections. I talked about earlier by being in person that you just can't when you're only virtual.

Speaker 1: Perfect. And then the final question about in person work. Do you have any tools, activities, or methodologies that you like to use in person?

Speaker 2: Yes. I obviously didn't do much of this, but I loved having just the use of stickies and so many different ways we would use it for planning and have everyone walk up and put their stickies and into different areas. Or we could use tickets for a storyboarding. We could be able to use a whiteboard to draw things out and train the team and talk through and draw through ideas or ways of laying out slides or ideas in a way that we just simply don't virtually it'll be more like drawn on a piece of paper and then sent a picture of it over. I think the possibilities are endless with even just those two tools.

Speaker 1: Perfect. And now I'm going to ask you the exact same question about remote work. What do you think are two benefits into drawbacks of remote work?

Speaker 2: Yes. Benefit number one productivity. You can just be in your space and make things happen and just ease of access. At any point in time, you're able to help with things, you can be anywhere. You can also have a little bit more time to do workout or to wake up a little bit later because you just don't need to get dressed or necessarily always look a certain way in a virtual world of work. It also saves you time of making food or whatever else is all easily accessible, but I think that ties into the two drawbacks, which number one is just lack of boundaries with work. And that because everyone's working on different time zones and is accessible at all hours of the day, people just don't log off as much or have separation from work or tell I'm set aside to just rest or be quiet and not thinking

about it. And then second, I would say a drawback is just the relational piece we talked about. So not being able to really know your coworkers or clients and feel connected to them that it will feel as if you're just kind of on an island doing work, being productive at the work, but ultimately it can be hard to remember the why of the purpose behind all of that work you're doing so productively.

Speaker 1: That makes sense. And then how do you like to structure these remote engagements? Is it camera on, are you interactive, voice only?

Speaker 2: Yes. I have been on different teams that have done it differently, but my preference is to have camera and sometimes it's hard when I don't look my best, but it just changes the interaction so much because there's less draw to multitask or to be distracted by other things when you're on camera and you know that people can see your face and your eyes and where they're going. So I do appreciate when there's an ability to all come in with our different voices, but I understand that also can just get a little bit out of hand with overlapping talking and whatever else. So my preferred mode is on camera, but having structures in place to either alternate speakers or provide some kind of other input mechanism that is a chat or a Menti poll. And that way people can then also come in and talk about their specific input when it's called out by the moderator.

Speaker 1: Okay. And then do you think that people that especially benefit from remote work?

Speaker 2: I think perhaps mid-level people who really have it figured out they know what their job is and how to do it. And they're able to just be efficient, have visibility into meetings because they're a high enough level to be in attendance but especially if they're a mom let's say, or just have a family that can be helpful to be able to just be around or take their kid to school before they log on and just have that flexibility.

Speaker 1: Okay. And are any tools, activities, or methodologies that you particularly like to use in remote work?

Speaker 2: Yes. I'm a big fan of Menti polls, Mural boards, the chat feature, voting features just polls and breakout rooms have been really helpful as well as just Atigma or other, really any kind of virtual interactive tool where everyone can be inputting information at the same time. Google docs or not Google doc, sorry. One drive and Microsoft Teams just providing everything in one place and allowing people to work on the same document at the same time, as well as screen sharing has been of paramount importance throughout.

Speaker 1: Perfect. Thank you so much. So in the next phase of the interview, I'm going to ask you two questions about the future. So how would your ideal work structure look like going forward?

Speaker 2: I think just as I said, maybe we go in person to our local office one day a week. Maybe we go to the client once every few weeks or every other week. And perhaps we continue to have remote work to some degree but definitely balance it with being able to see one another. And even if we're not going into our local office, we would still just have events or ways to see other people within the city that we live and feel connected to them and the work that they're doing as well.

Speaker 1: Oh, perfect. You answered my other question too, if we should have more events or anything like that, but it sounds like a yes.

Speaker 2: Yes.

Speaker 1: Perfect. And then final question. Is there anything that I didn't touch on that you would like to share about this topic of workplace settings?

Speaker 2: Yeah. I don't know, I feel like you covered it all. I think the last thing I would say is that it's such a catch 22 because autonomy seems like freedom in some ways, but I feel as if it just

led to more mental health struggles, purpose and otherwise and burnouts. So how to balance those two? And is it really so good to be all remote? I kind of don't think so. That's all I got.

Speaker 1: Perfect. Thank you so much.

### **Appendix B8: Consultant 3**

Date: John B

Speaker 1: I'm conducting these interviews for my DBA research and would like to ask you a few questions about your experience in varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Great.

Speaker 1: All right, first we're just going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: Five years.

Speaker 1: Okay. And how many of those years have you worked in person and how many remote?

Speaker 2: Well, my first job was kind of 50 / 50. I would be two days in the office, three days at home and that was for two and a half years. And then my second job was in person for six months and then at home for a year and then 50 / 50 again for six months.

Speaker 1: That's a lot of changes, a lot of back and forth. Have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: Yeah, I definitely started not having a routine and waking up, opening up the laptop and getting right to work. But now I'm definitely more of a routine person, again, moving back towards what I used to have. I used to have to get up, shower, commute, drive, get to

work and then drive home and have a routine. So I feel like at the beginning of full-time working from home, I lost any routine and now I'm trying to work back towards that. Does that make sense?

Speaker 1: That makes a lot of sense. And how do you prefer to engage with coworker? Would that be remote, in person, a hybrid?

Speaker 2: In person.

Speaker 1: Is that the same for clients?

Speaker 2: Yes.

Speaker 1: All right. In this next phase, I'm going to walk you through seven different scenarios and would just like to hear about how you would ideally respond to the situation. So you're meeting a potential client and would like explore if there's an opportunity for a new project. Who's your client stakeholder? So what level of seniority are they and then how do you engage with them?

Speaker 2: Could you repeat the question one more time?

Speaker 1: So you're meeting a new person and would like to explore if there's an opportunity for a new project. How do you engage with them?

Speaker 2: Well, I'd probably see if there's any personal connections to start. And then I think, you are sort of feeling out if people are comfortable meeting in person or if they want to keep it virtual given today's climate, maybe an initial meeting would be virtual, but with video on and then looking to sort out during that meeting what their comfort level is, and then probably be pushing for an in-person meeting after that.

Speaker 1: Perfect. And now you're working on a proposal for this client. Who's your target audience and what do you do to successfully close to deal?

Speaker 2: Who's the target audience? What was the second part of that question?

Speaker 1: And then what do you do to successfully close the deal?

Speaker 2: A target audience would be obviously the person that I've made contact with and I would also say probably one level above them just because you have to go to their boss, stay closer on their side. So making it digestible for them and to close the deal, making myself available for whatever works internally, whether it's in person, traveling to their client site or delivering a remote presentation again, based on their comfort and current business operation practices.

Speaker 1: This is great. So now you're kicking off this new project, who's attending the kickoff and how would you like to structure that meeting?

Speaker 2: For the kickoff, I would probably have my internal team as well as my client that I am working for. And I think that would probably be virtual to start.

Speaker 1: Perfect. And then during an active project, how do you prefer to engage with your client? And do you think it varies by stakeholder?

Speaker 2: Yeah, I definitely think it varies again, going back to the part with everyone's personally comfortable with meeting in person or not, as well as if there's any distance, if it was more of a local trip, I think I'd be more willing to push for in person meetings versus if it's distance, cross country I might just stick with the virtual option.

Speaker 1: Great. And when you think of important milestones or the end of an engagement, how do you like to present your findings and who is attending the meeting?

Speaker 2: I like to present in person myself. I would say anybody that's willing to listen would be great to be there, but if I had to fix some people it would probably be my direct client and then their supervisor so we could show significant results and value.

Speaker 1: Perfect. And then now you believe that there's potential for a follow up project. How do you like to communicate that with your client and if they're different people, how do you communicate with your client versus the person giving the final sign off?

Speaker 2: I would probably continue to see if I could meet in person with my direct client and then interact with the person that's giving the sign off in a virtual setting.

Speaker 1: Great. And then outside of engagement, how do you foster existing client relationships?

Speaker 2: I would say it's a lot of networking. I think LinkedIn is probably the most powerful tool that I use right now, personally. And meeting and connecting with other people and seeing who shared connections are and things like that.

Speaker 1: Great. Do you think there are relevant situations or experiences that you encounter with your clients that I have not touched on?

Speaker 2: No, I don't think so.

Speaker 1: Okay. Then we, we going to shift focus and talk about your opinion on in person versus remote work. So could you describe how you like to structure in person engagements? Would it be Monday through Thursdays weekly travel, special activities, anything like that?

Speaker 2: In my experience, my last company was doing and what I think works is trying to figure out who's working on what teams you decide on. Let's say a small group team day, as well as a large group maybe like your division kind of day. And then a floating day that leaves it up to other people if they want to come in an additional day or not. So I think having some sort of structure around who's working together and being together on set days that everyone agrees upon, through some demographic process, I think that's the best way to do it.

Speaker 1: This is great. I've not heard this one. And then do you believe that there are people that especially benefit from in person work and who would that be?

Speaker 2: I think new joins and new trainers will definitely benefit from in person work. I don't know if you're going to ask the flip side question, but I also think that there are benefits to remote work as well. Are you going to ask that question?

Speaker 1: I am. Give me two more questions and then we're getting there.

Speaker 2: Okay. So benefits for in person, I definitely think would be new joiners in addition to visual learners. I think tools are getting better for displaying information, but I think it's kind of tough to replicate sitting around a meeting room, drawing up ideas on a whiteboard.

Speaker 1: Well, you are already talking about my next questions. Are there any tools, activities, or methodologies that you particularly like to use in in person engagements? So whiteboards I'm taking?

Speaker 2: Yep. Whiteboards when we're in person. That's probably the main one just whiteboards really. I think it usually also helps to probably have one person with a laptop open, but I don't like having in person meetings and having everybody with their laptop open because I think people are just too susceptible to distractions.

Speaker 1: Yeah. That makes a lot of sense. So now I'm going to ask you the exact same questions about remote work. So how do you like to structure remote engagements? Would it be camera on, are you screen sharing? Are meetings interactive, voice only?

Speaker 2: I think it depends on the meeting. I think for internal call standups I think audio only is fine. I think for first time meeting or individual conversations video is preferred. So I guess to put it cleanly, if it's less than five or less people on a call, I would say video on, if it's

more than five, then it would be video optional except for the speakers. I think the speaker should always be a video on.

Speaker 1: Perfect. And then what people do you think benefit from remote work?

Speaker 2: Yeah, so I used to have a coworker that is more introverted, and I think remote work enables them and it empowers them a little bit to be able to reach out via message as opposed to having to walk up and approach somebody in the office. So I think introverts are definitely benefited by remote work because it gives them an equal voice as opposed to when they're working with their extrovert colleagues.

Speaker 1: Perfect. And do you think there are tools, activities or methodologies that you especially like in remote engagements?

Speaker 2: Yeah, I really like Teams. I used to use slack, but I think that has too much going on with the emojis and stuff like that, that you can tag onto things. So I do like Teams being, it has to be structured well though. Once you have a million teams, it doesn't actually make sense. You should really kind of be careful about what you have for a team in a channel, in a chat or a thread. Also, just the video capabilities for hosting meetings and teams and having it be in one spot, I think is also useful. Also in remote work I've seen a lot of benefits using Trello boards, but again, they have to be set up right and have a well-defined purpose.

Speaker 1: Perfect. So in this next section, we are then going to talk about the future of work. How do you foresee our projects to be structured going forward?

Speaker 2: I see a lot of them being virtual for the most part or a majority of the work. I think that, as I kind of mentioned before, I see a lot of in person meetings at the start of a project or at the end during a delivery. But probably a lot of the meet during the middle of the project will be virtual. I think to some degree companies are kind of more moving or

consulting companies are moving to a localized model. I think you already see that with companies like Slalom or what's the other one that does localize? I think it's RSM, is very localized, locally focused for their projects so they don't have people moving around at all, but it's kind of tough when you have experts in different spaces and you want to get them involved on a certain item or a project rather.

Speaker 1: That makes sense. And then personally, what would be your ideal structure?

Speaker 2: My ideal structure would be probably traveling to see a client two or three times, maybe two, a month for varied length or for varied reasons and then working from home. So I'm not sure if it's always a structured one week traveling one week not traveling but when it's deemed important for the face to face interaction.

Speaker 1: Great. And how do you foresee us using our buildings, all the innovation hubs and offices and the infrastructure that we have?

Speaker 2: I think that buildings will probably sort of move into, what do you call it, sort of a floating desk model where we'll have buildings that we can go into. So if we are in a location, there will be an office available but I don't think we are going back to the days of dedicated desks to individuals anymore.

Speaker 1: Okay. And then what should we do to continue to strengthen our company culture? Is it office days and Christmas parties? Is it gifts, activities?

Speaker 2: I definitely think it's activities. And I think there's different activities that you can do, but I think in person social interaction is probably the best way to continue or foster a company culture.

Speaker 1: Great. And then I have three final questions for you. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Number one piece of advice is, I think it's always trying to figure out how that person likes to be, or how that person likes to interact and be interacted with and then meeting them in those channels, whether it be in person, a call every morning at eight o'clock, or sporadic texting. You have to try and figure out what they like and then mold into that system.

Speaker 1: And then what makes a client engagement a success in your opinion?

Speaker 2: I think when the client has a problem and thinks about you as the consultant, without being prompted by anybody else as their first go-to resource. I think that's what makes or showcases a successful client relation.

Speaker 1: This is great. And then do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: With regards to virtual, remote working?

Speaker 1: Yes, and workplace settings and company culture?

Speaker 2: I definitely think that it's important to give certain people flexibility, I myself like going to the office but I'm probably going to be more on the three days a week in the office kind of side, but I do like working from home on certain days. And I think that you need to be flexible for people who want to be in the office every day and none of the days. So I think that's what companies need to focus on is providing options, but also making sure that it works for their people and that the teams get along and get information done.

Speaker 1: Perfect. Thank you!

## **Appendix B9: Consultant 4**

Date: Owen

Speaker 1: I'm conducting these interviews for my DBA research and am going to ask you about your experience in varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yeah, that's fine.

Speaker 1: And then this transcript will be made anonymous and attached to the final project. Is that okay with you?

Speaker 2: Yes, that's also okay.

Speaker 1: Great. So first we're going to talk about your experience. How long have you worked in consulting?

Speaker 2: So I've worked in consulting now for two and a half years. I started in August 2019 and I've been here at Accenture since then.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: In person I worked August through March of 2020, so seven months about, and then the rest of that has pretty much been remote. I did have to go to the client site for three days last June, but otherwise it's been seven months remote. And then 23 months remote.

Speaker 1: Okay. And have you detected any changes or new habits that you've developed since working primarily from home?

Speaker 2: Yes, definitely. I think now when I work from home I tend to work more on my own schedule. I might work sometimes after hours or early in the morning. I might like go run an errand during the day if I have some free time. So I think I kind of vary my work like that a little more. I think also another thing I've noticed too, is that when I'm working from home it can be a little more difficult sometimes for me to be focused on a meeting if I'm just in my room. I think also you said difference in habits, right? At the same time sometimes, I am more productive because I don't have the distractions of other

coworkers to go to hang out with or talk with. When I do join meetings it's only about work and so I don't find those distractions. So, my productivity is better in one way, but not good in other ways. So it's kind of mixed.

Speaker 1: This was perfect. So then how do you prefer to engage with coworkers? Would it be remote or in person or hybrid?

Speaker 2: Yeah, I think hybrid would be best, but I think I would always prefer in person because there's a lot of things that you get from working with people in person that you don't get from working remotely. And I think especially in today's digital age, when a lot of us are remote and not interacting with each other, I think in person always is better. There are a lot of visual cues and body language and things that you get from being in person with someone. And it's just much better for developing relationships, you can't replicate that, I think no matter what kind of metaverse you can create.

Speaker 1: Is this also how you prefer to engage with clients, in person?

Speaker 2: Yes.

Speaker 1: Perfect. In this next phase, I'm going to walk you through seven different scenarios and would like to hear how you ideally respond to the situation. So in the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project. Who's your client stakeholder and how do you engage with them?

Speaker 2: So sorry, can you repeat the scenario again?

Speaker 1: Yes, you're meeting a potential client. How do you talk to them?

Speaker 2: How do I talk to them? I think I would set up a meeting to introduce myself, my experience and background and also just to better understand them, their history and just get a sense of the problem and what it is they're trying to solve why they need Accenture's help. I think that's the biggest step. I think I would probably interview the client and all relevant

stakeholders as well to really get a sense of that. And then also get whatever team I'm involved with to maybe just conduct some of those interviews and introduce them.

Speaker 1: Perfect. So now you're actually working on a proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: I would probably develop some kind of presentation sort of sales pitch, to present the problem, present why our company can provide the solution for them, why we think that our solution is better than competitors and then provide some kind of rough overview or timeline of how we expect to implement the solution for the client. And of course room for feedback and questions at the end.

Speaker 1: Perfect. And now you're kicking off this new project. Who's attending the kickoff and how do you like to structure the meeting?

Speaker 2: Who's attending the kickoff? Everyone from my team would be attending the kickoff and then the same for the client's stakeholders. And I think as part of the kickoff we would go over the time, like the first phase and overall timeline. The we'd focus more on the first phase, like what are the deliverables that need to be met by certain key dates, who are the parties involved, what kind of work and research will be conducted and, how often the cadence will be. I think a lot of those things would be discussed in our kickoff.

Speaker 1: Perfect. And during an active engagement, how do you prefer to engage with your client and do you think it varies by stakeholder?

Speaker 2: Yes, I think so. I think I would prefer to engage in my client in person, as interactive of a way as possible. Like always making sure that their needs are met and always being intensive in looking for details and what they say to make sure that's accounted for and the solution we're developing and really just working with them as best as possible. The clients' needs always come first. And then of course reeling that information back to my

team and making sure that the solution is adjusted accordingly. So just being really attentive, honest and open to client feedback.

Speaker 1: Perfect. And now at an important milestone during the engagement or at the end of one. How do you like to present your findings to your client? And then who's attending this meeting?

Speaker 2: I would present it via PowerPoint and then kind of just highlighting some of the results. And then also if there are further detailed items needed to be forwarded or sent the client sent those offline via email to relevant stakeholders. My team and the relevant client stakeholders are attending.

Speaker 1: Perfect. And now you believe that there's potential for a follow up project. How do you like to communicate that with your client and if they're different people, how do you communicate with your client versus the person actually signing off on the new project?

Speaker 2: Yeah, so I think for follow up work the best thing to do for that would be to really make sure that the solution is fully developed first and understand that there would be a need for it. And then once there is kind of a pitch to the client stakeholders, they need to believe that there is a need to continue some follow up work. Then I think some kind of meeting where a handoff meeting would be necessary where the client, myself or the new stakeholders would set up a meeting where we transfer some of the history that we had with the current stakeholders to the new stakeholders to make sure that the follow up work is set up for success.

Speaker 1: Perfect. And final question outside of engagement, how do you foster existing client relationships?

Speaker 2: Yeah, so I think outside of engagements it's important to have some time with the clients to understand their lives outside of work, to know them better. I think that's important

and in non-COVID times potentially do some kind of happy hour and things like that. I think that's all pretty important. I think outside of engagement that's probably the best way, just informal networking time.

Speaker 1: Perfect. And then do you think there are any other situations that you encountered with clients that they did not touch on?

Speaker 2: No, I think that's about it.

Speaker 1: Right. Then we're going to shift focus and talk about your opinion on in person and remote work. So can you describe how you would ideally like to structure in-person engagement? Is it Monday to Thursday, weekly travels? Do you have dinner with your client, special activities, anything like that?

Speaker 2: Yeah, I think it would really depend on client and the specific engagement in projects, but I think in an ideal world maybe travel to the client site every other week or every month even. So not that often but I think probably go Monday through Thursday or even Tuesday to Thursday to the client site and then special dinners, happy hours, things like that. I think something like on the frequency of once a month would be nice.

Speaker 1: Perfect. And do you think there are people that especially benefit from in person work and if so, who's that?

Speaker 2: Yeah. Good question. I think people maybe that are more potentially outgoing and extroverted would benefit more from in person work because I think those people tend to thrive when they are surrounded by other people. So I think those people would be best suited for in person work.

Speaker 1: Perfect. And are there any tools, activities, or methodologies that you particularly like to use in in person engagements?

Speaker 2: I like whiteboards actually. I think whiteboards are a good tool for brainstorming and writing down ideas. I think it's good to always brainstorm and write different ideas down. It doesn't have to be like a perfect Excel document or anything like that. I like whiteboards a lot. I also just like in person meetings, like in conference rooms or even private rooms, if you have to have a one on one to someone.

Speaker 1: Perfect. Now I'm going to ask you the exact same questions about remote work. So how do you like to structure remote engagements? Is it voice only, camera, screen sharing, do you make it interactive?

Speaker 2: Yeah, I think for remote meetings if there is an important client meeting, then I would prefer to have video on typically. If it's a less important meeting with the client, then I don't think video is necessary. And I think for internal team meetings, if it's a very important meeting camera's on, if not, then cameras don't need to be on. I think also it's important to gauge the interest level of the rest of the team. If no one really wants cameras, then maybe not necessary. I think it'll also depend on the meeting frequency and I think it'll depend on the client as well. How long the timeline is, how fast the deliverables need to be presented and delivered. Sorry, what was the rest of the question? I don't know if I answered.

Speaker 1: No, you did. And then do you believe that there are people that especially benefit from remote work?

Speaker 2: Yeah, I think maybe people who are more introverted. I think of people if they thrive better, if they have some more low time also I forgot to mention too. I think people who do in person and work better, those people might be less likely to have families and other obligations that they need to attend to. Whereas if you're in person, it might be a little bit easier to take care of your family, not have the travel all the time on site. So I think that's

another thing to consider, any family obligations or things like that I think could potentially prohibit people from going in person sometimes.

Speaker 1: Perfect. And are there tools, activities or methodologies that you like to use in remote engagements?

Speaker 2: Yeah. I mean obviously Microsoft Teams and then I do like some whiteboarding. I haven't done a whole lot of virtual white boarding, but I think things like Mural. It doesn't even have to be Mural, just like some kind of common space to write down ideas. I think with clients it's pretty important. I do also like putting things into a table format, so I like working in Excel a lot to kind of outline structures for different things. And that's all I can think of.

Speaker 1: This was great. In the next phase, I'm going to ask you about your opinion on the future of our work. So how do you foresee projects to be structured going forward?

Speaker 2: I think they will probably be some kind hybrid. I think that would probably be what I would think, because I think people acknowledge the benefits of both in person and remote work, but they also realize that we don't need to be as in person, as we were pre-COVID. So I think some kind of hybrid would be the optimal solution. I don't know what kind of frequency that would be. I think it would depend on the client but I think that would probably be optimal.

Speaker 1: Okay. And then personally, what would be your ideal structure?

Speaker 2: I think a hybrid, because I definitely like some aspects of remote work, but I also in person. I think I would probably lean a little bit more towards in person but I think there should be some remote work mix in there, I think.

Speaker 1: Got it. And then what do you foresee as doing with our buildings and innovation hubs and offices? How should we use them?

Speaker 2: That's a good question. I think they should be used to potentially bringing clients to kind of show what kind of innovation work Accenture has done in the past and then also help them brainstorm and identify problems that they have in their own organization and then brainstorm potential solutions.

Speaker 1: Okay. And what do we do to continue to strengthen our company culture? Should there be office days, Christmas parties, gift sending?

Speaker 2: I think all of the above. I think office parties and anything really to help build community in the local office. I do obviously we're a big company, so it can be a little easy to maybe feel a little lost sometimes. So I think it's important to remind people that they are part of a larger family and help promote that through different in person activities, volunteering events, happy hours or whatever else.

Speaker 1: Perfect. And the final section has three more questions. So one, what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Number one advice I think would be to be as open as possible to the client and make sure that all their needs are met and attended to. I think that would probably be the most important thing.

Speaker 1: Okay. And what makes a client engagement a success in your opinion?

Speaker 2: I think making sure that there's good communication. I think oftentimes if one party perceives one thing in one way and one party perceives another way and that's not communicated well, even if you have the best solution and you can't communicate it, then you can't really deliver it well. So I think communication is one of the most important factors.

Speaker 1: Perfect. And do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: No, I don't. I think maybe one thing is just like remote versus in person is tricky. And I think a lot of companies are still figuring it out. So I don't think that there's necessarily one right solution. Companies, obviously the COVID situation changes so rapidly. So I think companies have to be ready to adapt and change their work models depending on the COVID severity and having a back to office plan. I'm not sure that a long term one is really feasible. I think companies really have to pay attention to the signs that's evolving and what the government's saying. So it's really not. So I think cut forward and straightforward but I think for now it's been doing a pretty good job to make sure that the workers are safe. So I'm okay with the remote work.

Speaker 1: Perfect. Thank you so much.

### **Appendix B10: Consultant 5**

Date:

Speaker 1: I'm conducting these interviews for my DBA research and I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: That sounds good.

Speaker 1: Perfect. So we're first going to just talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: I have worked in consulting for a little over three years, about three and a half years.

Speaker 1: Perfect. And then how many of those years have you worked in person and how many remote?

Speaker 2: I started in 2018 and had about a year and a half in person before it switched to fully remote.

Speaker 1: Have you detected any changes or new habits that you've developed since working from home?

Speaker 2: Oh, definitely. I feel like I have become not as great at networking and keeping up my network just because at the beginning of work from home, it felt, it was easier to be motivated to join a zoom call for a happy hour or to meet up with someone via zoom to chat. But as we have continued to be in the zoom team's meeting world, I feel like that has definitely not been something I've been good at keeping up. With that, teammate relationships have been a bit different since our teams are spread all over the United States. For my experience since going remote, I haven't really had the opportunity to meet any of them in person, and then just personally, I feel like it's easier to stay endured in your work past going to dinner or mealtimes. It was easier to step away and kind of get that break. But working from home, it's a lot easier to just push right through mealtimes and that sort of work life balance.

Speaker 1: So when you think of your coworkers, how would you prefer to engage with them? Would it be in person?

Speaker 2: Yes, definitely in person.

Speaker 1: And what about clients?

Speaker 2: I would also say I would like to engage with clients in person. I just feel like with virtual working, I haven't really gotten the deeper relationship to my clients and that could partially be because I do own some client relationships and with those people, I feel a little bit closer. But with our client leadership, for example, I feel like it was always easier to create a better bond if I'm not directly working with them in person, just because you

can have those water cooler chats sometimes. So I feel like that does hit on my client relationships, not in as much of an impactful way as coworkers do, but just in a feeling of being close to those people.

Speaker 1: Got it. Well, we are now shifting focus a tiny bit, and I'm going to walk you through seven different scenarios that we encounter with our clients. I'd just like to hear how you would ideally respond to this situation.

Speaker 2: Sounds good.

Speaker 1: All right. So in the first scenario you're meeting a potential client and would like to explore if there's an opportunity for a new project, who would you like to meet with and how do you engage them? So what level of seniority are they and is it an email or is it a meeting or how do you start the conversation to discuss a new project opportunity?

Speaker 2: I feel like in that case, it would be more senior leadership. I don't think necessarily starting from my view right now that may change as I grow in my career. I feel like not starting at the high, high, like C-level would be not where I'd start, but maybe like a senior vice president or vice president level, someone who has it their way and is closer to the issues at hand. So if I am meeting them at an event or something of the sort, and they tell me about an issue they're facing with their team or a certain project. So I would reach out via email first and just say we connected and discussed this item you're having trouble with. I would love to meet and discuss how Accenture could potentially support that work that you're doing. If it was a closer friend, I would definitely bring them into some sort of meeting, maybe lunch, and discuss kind of the issue at hand a little bit deeper and walk them through some of the opportunities that Accenture could offer. But I feel like that would be the distinction. If it wasn't someone I was close to, start with an email, if it was a close friend immediately, let's go to lunch and chat about this a little bit more.

Speaker 1: Perfect. And now you're working on a proposal. So who's your target audience and what do you do to successfully close the deal

Speaker 2: In terms of our proposal? It would definitely be at that C-suite level. And closing the deal, I feel like maintaining a relationship really depends on the client, but with the proposals I have helped work on, there's at least one person on the team who has more of a familiar relationship with the client so you can get some idea of what they're really looking for, not on just a paper and pen five bullet point list of items, but kind of more personally what that client is facing. I'm sorry, can you repeat your question again?

Speaker 1: No, no, that was perfect. It was just about what do you do to successfully close the deal?

Speaker 2: Okay. Yeah, so I think having that a type of relationship and then making sure to build your team and keep that close communication throughout the proposal is important to close that.

Speaker 1: Great. And then you are kicking off this new project, who is attending the kickoff and how do you structure the meeting?

Speaker 2: Love that I've successfully landed the project. I would start by inviting people. I think throughout the proposal process, you have your big group of people potentially working on the proposal, but when it comes time to actually go into that first session with the leadership, keeping it a closer-knit group. So maybe the client's account lead overall, the person that has that personal relationship with the client, if that is a part of the proposal that helped drive that, the main leader, whether it be a senior manager or MD, depending on the type of projects and how the project is. And then maybe if they're in a very specific area that they want that type of subject matter expert at the table to start to just build that level of confidence, but keeping it a smaller group and driving home the object and what we're there to deliver.

Speaker 1: Great. And then during active projects, how do you engage with them?

Speaker 2: Yeah my experience really varies, but I think one thing that's continued throughout my project experience and in terms of engaging with the client, is having weekly sessions with leadership to give a status, especially as we look at shorter term high focus on deliverable projects. I think it's really important for leadership to have the opportunity, to understand where we are making headway and where we might need some additional support from leadership to help drive the deliverables they're looking for. Another important piece has always been I feel like you always have the group of two to four people that your team is really close with. So making sure to keep up touch bases with them, whether it be weekly or biweekly, depending again, on the length of the project to really make sure you're keeping up that client relationship with them is important. I also think finding some sort of pain chat with the close representatives, if you're at that level of comfort with your client is important as well, to be able to communicate frequently whenever needed.

Speaker 1: This is great. So now when you think of important milestones or the end of a project, how do you present your findings and who's attending the meeting?

Speaker 2: So in terms of milestones, I often see those given in PowerPoint format. So we'll give our deliverables at a high level. For example, if you're walking through a large program plan, potentially giving one slide updates on each part of the plan, having your again senior account member depending on the type of deliverable,s is really important. Maybe not the client account level, but the MD level, certain senior manager level, then the consultant level, really having the people that the client has been face to face with throughout the whole entire project. I think it is important if you're at the level of comfort with the client where they're okay with having someone who is less senior, but has played a really important role, I think that's a good way to deliver those final pieces to make sure;

one, the people that do the work day to day are incorporated in that, but two, be able to ask any questions as the end about who did you work with or how did you feel this ended or was transitioned? So in a meeting format, reviewing of deliverables.

Speaker 1: Is this meeting in person or remote, ideally?

Speaker 2: I feel like that final meeting isn't as important to me. I feel like they've gone well, both from an in person or virtual way of format. I feel like in person. I just have a bias there in terms of, I think it's always more memorable to be able to deliver items like that in person and be able to really discuss in an environment everyone is paying attention and fully focused on the moment, but that's just a personal bias. I think they both are good, good opportunities for delivering that type of news.

Speaker 1: Perfect. And then if you think that there's potential for a follow up project, how do you communicate that with your client?

Speaker 2: I think it's important, if it is attached to the work you've been doing, to have that maybe as part of the deliverables. Like the next steps and path forward, making sure to include the areas of opportunity or potential pain points that the client has at the top of mind. And then keeping up that type of relationship via email, or maybe your client is looking for a more personal meeting a month after the project is over to see what's going on, where we can support, that type of relationship and communication style seems to be a good place to start.

Speaker 1: Perfect. And then I have one final scenario. Outside of engagements, how do you foster existing client relationships?

Speaker 2: I know with one of my clients, we've continued to stay really in touch with their program. And in this instance, our project ended on a slightly weird note where they asked for more engagement from our program. So they wanted to extend our project a little bit, but just

budget wise it wasn't working. So there was some communication, the client really still reaches out frequently for that help. But in that case, we as Accenture provided some extra time for feedback for this client and really stayed in touch with them via email primarily. I know previous clients it's just kind of late day or if an email does come across from someone that is at the company, just kind of saying, Hey we've stayed in touch with X, Y, Z person if we want to pull them in for a meeting. I think that'd be great. So mostly email or LinkedIn, something of the sort. But some of the clients that want more attention without necessarily paying for a project. It's a fine balance to walk between providing a lot of feedback and mentoring.

Speaker 1: Yeah, I agree with that. Do you think there are other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: From the whole life cycle of a project, I think those are some of the good relevant pieces of information. So no, I think those were a good run through.

Speaker 1: Awesome. And then we're going to shift focus one more time and talk about your opinion on in person and remote work. Could you briefly describe how you like to structure in-person engagement? Is it Monday through Thursday, weekly travel? Is it dinners? Is it special activities with the team?

Speaker 2: Yeah. I feel like from the perspective of someone that in that year and a half, I traveled for pretty much a full year, Monday through Thursday, I really loved that style of engagement. However, I do feel like it was very easy to get exhausted with that amount of travel and with a really demanding client project. So I feel like on one page, I think it's important to have that in person meeting with both your client and your team. But I feel like if I had my perfect world of consulting in person, it would probably be two or three weeks that traveling was required with kind of a mix of virtual and in person as we move

forward. If it's a local project and we don't have to travel to meet as everyone is in the same city. I really love going out to dinners or doing some sort of team work event. I know one of my favorite ones was, we had the opportunity to go do a painting workshop and a karaoke night with one of my projects. And I really thought that was a fun way to stay engaged with the team without working or chatting about work.

Speaker 1: Yeah, this is great. So do you think that there are people that especially benefit from in person work and if so, who would that be?

Speaker 2: Yeah, I feel like the people that are really sociable, are personable and kind of an extroverted personality thrive in in person because in my experience it was early mornings and late nights and a lot of keeping up the relationship with both teammates and clients versus virtual, the people that maybe a little bit quieter in person, it's not as noticeable with virtual work because most of the time, even those quiet people are going to be presenting on some sort of zoom call and at least have that presence there versus in an in-person environment. It's easier to look over maybe the person who doesn't talk, as much to the rest of the team or the client, as much as someone who's very social or extroverted does.

Speaker 1: Great. And are there tools, activities, or methodologies that you particularly like to use in in personal engagements?

Speaker 2: What do you mean by that?

Speaker 1: It could be anything, stickies has been a very common answer, but it could also be icebreakers. You could say that it's just dinners, anything where you need to get together to drive your purpose.

Speaker 2: Yeah, in terms of project work, I love having a working room. I think not having just a meeting room, but having a room with a whiteboard or a display where you can really do

group activities and working through an item is really helpful to spur on some of that creativity and to know where you're going versus kind of isolated working. So in terms of moving a project or deliverable along, I think that's important. But for my second point of relationship building with the team, I find an event outside of just dinner is really a great way to get everyone motivated. So whether it be an escape room or like I said, karaoke night or paint night, something that allows people to just be not to really focused on work for a night really helps to rejuvenate, and make people a bit more excited to come back most of the time to a working environment.

Speaker 1: This is great. So now I'm going to ask you the same questions about remote work. So how do you like to structure remote engagements? Would it be voice only, camera on, screen sharing, interactive?

Speaker 2: I personally love having cameras on and my current client doesn't do that at all. And it kind of makes me feel isolated. So I think cameras on is really important, for working and building out deliverables. I like to screen share with a couple of people just to get the straw man started and be able to assign from there. Like make sure everyone's on the same page of what we're going to do with our deliverables or our engagement and then kind of go from there. So I am definitely more of a group person. I enjoy that type of work and then splitting off from there and making sure your kind of heads down time is also respected is important.

Speaker 1: I think you already answered the next one question on what people benefit from remote work and it's those that are introverted that still get the time to present now. Correct?

Speaker 2: Yeah, I think that is fair. I also think that people with families benefit with remote work, depending on how their family is. Currently, I know my coworkers with little kids have

really enjoyed it because it allows them the opportunity to be there and not have to be traveling throughout the whole week. So I would call that out, too.

Speaker 1: Okay. And then are there tools, activities, and methodologies that you like to use in remote engagements?

Speaker 2: Yeah, I know I'm probably going to say it wrong. I believe it's Verbal, but I could be wrong about that, it's just a question generator to get some thoughts and ideas going for teammates. And I can't find what it's actually called. I know I've driven some workshops that have worked well, but I think ultimately it comes back to allowing that time for the team to come together and think through how to deliver something versus you getting the assignment or understanding what you need to do. And then, Hey, go off and do this and then come back to us and we can review offline type of thing. I'm not as big of a fan of that.

Speaker 1: Got it. And then I'm going to shift focus a tiny bit again and talk about the future of work. So how do you think we should or we are going to structure our projects going forward?

Speaker 2: Yeah, I've been thinking about this one. I'm not really sure. Like I said, my ideal state is going back to traveling a bit, but ultimately having that mixed virtual and in person experience where you are not burning people out as much with traveling every single week. And obviously from a cost perspective, I'm sure it's a bit better to not have people expending flights and hotels, but that I feel like it's going to be some things that companies focus on both from a financial and people perspective. So I wouldn't be surprised if it was more of a mixed in person and virtual as we move into the future of work.

Speaker 1: Got it and how should we use our infrastructure? Do you have an opinion on that for our innovation hubs and offices?

Speaker 2: I feel like it's still important to have that. And I feel like, I know for example, our office just opened back up at 50% and allowing people to go and work in the office, this environment is important at times. But also for client engagements and bringing them to an innovation hub to kind of show off some of the items that Accenture might have that they'd be interested in is also important for the engagement, for our clients.

Speaker 1: Okay. And tangently related, how should we continue to strengthen our company culture? Would it be get togethers like office days and Christmas parties? Is it gift giving?

Speaker 2: Yeah, I think that being able to see people in person would be great. So that is having that Christmas party or the yearly party would be something that I would do, Gift giving, I feel like at this point of time has kind of felt overdone and like I'd rather have that money that you spent to sending me a gift be given towards an in-person event.

Speaker 1: All right. Then I have three final questions for you and then we're done. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: I feel like managing that client engagement, I feel like my number one piece of advice for when I've seen it go really well versus maybe could grow, is making sure the give time to nurture the relationship between you and some of the leadership, even though it is a technical, or virtual world being on that potentially text basis or making sure to have that personal relationship really helps not only future projects but also the team to stay engaged and close with the work at hand.

Speaker 1: Got it. And then what makes a client engagement a success in your opinion?

Speaker 2: In my opinion, I think that it's successful when the client needs you, not that you're always needed because I feel like that can kind make it dangerous when you're in the space of we need you or else we can't do this. But when they want you to continue back and they really continue to reach out and ask questions and they built that confidence in you as a

subject matter expert. So I think having leadership understand the great pieces and pull you in is a show of a successful engagement.

Speaker 1: Perfect. And then the final one, do you have any last pieces of advice or thoughts on workplace settings?

Speaker 2: No, I feel like I've voiced my thoughts.

Speaker 1: Perfect. And thank you so much.

### **Appendix B11: Manager 1**

Date: Yanyan

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experience with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Go ahead.

Speaker 1: Okay. And then the transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: Awesome. We're first just going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: I started after I finished school, so that was two years and I went to work on the client side, a non-consulting firm, was there for a year and a half then I came back. So maybe in consulting total 4.5 years. Almost five years.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: Remote is only the past two years.

Speaker 1: Have you detected any changes in yourself or new habits that you've developed since working from home?

Speaker 2: I personally enjoy working from home because I think it's much more flexible. It's like when you go to the client, you have to wake up like super early at 5:00 AM in the morning on Mondays, then all the travel and then you go to the hotel, the air condition is so cold and I couldn't sleep well sometimes. And food is, it depends on which city you go. For example, when I went to Atlanta, they don't have a lot of Asian food. I have an Asian stomach. Working from home is much more flexible and I feel like I'm more efficient and I feel I have more work life balance right now than before. I don't want to go back to normal. I hope the best scenario is maybe we travel once in a while. Like maybe, whenever we need some face time with the clients, but the rest of the time work from home.

Speaker 1: Perfect. So then when you think of engaging with your coworkers, how do you prefer to do that? Would that also be remote or hybrid, maybe meeting them sometimes and then catching up online the other times. What do you think?

Speaker 2: You mean the customers or first

Speaker 1: First the team and then we'll talk about the client.

Speaker 2: I think the team, I don't need to meet them in person. Maybe, I don't know, it's good to meet, but I don't think it's a must. It is good to meet if for example, we are on a six-month project, like meet like once or twice. But I don't think we need to meet often to be honest, like Teams video works pretty well in my opinion.

Speaker 1: And then it sounds like it may be different for the client?

Speaker 2: For the client. It's a little bit different especially if you want to sell stuff or you aim to sell stuff you want the relationships. I do think meeting in person is a little bit different from meeting through the cameras conference calls. I also think maybe like every couple months, every two, three months, would be good enough to meet the clients. You don't need to meet them every week in my opinion. I mean, if every couple months is not

enough, maybe like at least every three, four weeks. But it definitely needs that in person time with the client to develop a good relationship, if you want to extend the contract or sell new deals.

Speaker 1: Got it. So we're actually going to get into that now. I'm going to walk you through seven different scenarios that we encounter with the client. And I would just like to hear how you would ideally respond to the situation.

Speaker 2: Okay.

Speaker 1: In the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project, how do you engage with them? Is it an email and a dinner? Is it a workshop? What's the first meeting ideally like?

Speaker 2: I think it depends how you guys know this client. It also depends on if you're in the same city, if it is in the same city, I will for sure meet that person in person because it's more effective. Especially for a new client, but if it is not in the same city and you can do in person, I will say at least to FaceTime or a video call. In the beginning it is important to reduce that emotional distance and if is a huge deal maybe fly out. I think in the beginning it is very necessary to build a relationship faster when you see another person's face.

Speaker 1: Got it. So then now you're working on proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: Who's the target audience? It depends on who is the buyer. At Accenture, I'm pretty sure they also have this power dynamics map. Like you want to know who the buyer is, who's going to sign a contract, who is the major decision maker, a law of times like a committee, a group of people who are the major influencers and who dislike Accenture, who may want to go with a different consulting firm. You want to get a good understanding of the dynamics within the client's before you act, I think that is really important.

Speaker 1: Okay. And then now you're kicking off this project, who's attending the kickoff and how do you structure the meeting?

Speaker 2: That also has a lot to do with the important people in this project. I think for the kickoff call, it will definitely need to have the person who is sponsoring this project. High chance that person is the person who actually signed the deal and the person who's kind of like a deputy for that person. Like the person who actually runs the operation together with Accenture, or your day-to-day contact. Those people are important. And I also think before the kickoff call we should have a small group conversation about how it should be structured, like what is the way of working and then who is going to do what, those kind of things should be figured out before we have a kickoff call to announce. I think that kickoff call is just a formality to announce what was decided before the call.

Speaker 1: And then during an active project, how do you prefer to engage with your client? Do you have standup calls? Do you meet them every once in a while? Anything that gets you structured during the project?

Speaker 2: I think the standup call is very important, at least like meet twice a week with the important client sponsors and the people who are running the project, so that they stay in the loop of where things are. I don't know, maybe it depends on the project if every day is too much and it can be too much sometimes. Because there are so many calls, then every other day or twice a week. I think minimum should be like maybe once a week. It also depends on who is going to attend. If the person who's going to attend is super busy, like where they probably don't have so much time to meet with you, but if they're not as busy, maybe meet at a frequency that everyone feels comfortable and not too much or not too little.

Speaker 1: Got it. And then if you think of important milestones or the end of an engagement, how do you present your findings to the client?

Speaker 2: Do you mean the format?

Speaker 1: Yes, should that maybe be in person or would it be online?

Speaker 2: I think in person's always good. I mean, especially for the final presentation, that's important, unless the final presented is just a formality, like you have already aligned with everyone before the call. I think it depends on who are in audience for your final presentation and what kind of impact that you're trying to create. If it's a situation like you already align with everybody and everyone already knows what you're going to talk about and it's pure formality then maybe a video call is good enough, but then if you're teaching this to a CFO or a CEO, then you should be in person because that's important. It really depends on like what the scenario is.

Speaker 1: Got it. And then if you believe that there's potential for follow project, how do you communicate that?

Speaker 2: I will have a conversation with a client. I would do it in a more casual way and just talk with that client, like I would you say, Hey, I noticed that you may need this and what do you think? And then treat the client like a friend, and see how the client will react and then go from there. And if the client thinks that you can work something together, then it's a natural sell. I don't think I want to do forced sells, it may work, but it's not my style.

Speaker 1: That makes sense. And then outside of engagements, how do you foster existing client relationships?

Speaker 2: I just treat them like my friend. Some dislike me and I dislike them. I mean, there are situations like that you just don't click, but most people I get along with. Like they're also human beings. I just treat how I treat my friends, you chat with them and try to get to

know them instead of just a pure name and face, they also have a family and things they care about. The same way that I interact with my Accenture coworkers.

Speaker 1: Perfect. And do you think there are other relevant situations that you encounter with your clients that I did not touch on?

Speaker 2: I think sometimes there are situations that some clients can be very defensive, especially like I mentioned that there are supporters and there are also people who don't support, like they wanted to hire another consulting firm or they feel like you're taking their job away or for some reason they just feel defensive. And I have had situations like that too. And you know, they just disagree with what you suggest in an un-cooperative attitude. I found in those situations that hard selling does not work. Like we had a client who's very defensive. We had someone who's very senior from Accenture who always tried to tell the client what the right way is to do things. And what we said is right, but I think the way we said it makes them feel like you're educating them. I think educating, especially if the client is a very senior person, they feel offended. So by observing I found that to deal with defensive people, you have to do it in a way and do not make them feel like you're trying to teach them something or like you make them feel they're inferior or something. Treat them as a partner and over time you win their hearts. That's my experience.

Speaker 1: This is perfect. Thank you. We're going to shift focus a final time and talk about your opinion on in person work. So how do you like to structure in person engagements? I know you talked about how ideally we'd go out like once a month. Would it be an entire week and do you have special activities and dinners, anything like that?

Speaker 2: When we do meet in person it really depends on the purpose of the in person trip. Is it just to get to know people, or say you have a major workshop that you're planning to host in person. So if it's pure social and just want to have face time, I would just say go to the

client conference room and do the work and the, at the end of the day, maybe, definitely go have dinner, go have some fun with the clients and the Accenture team, because that's your purpose. But if it's a workshop or planning session or something, then you do the work and also try to use the time to get to know each other more. So I guess it's the same, whether you try to do it for social purpose or a major event, you always try to you have dinner and have some fun with the clients when you are in person.

Speaker 1: Perfect. And then other than sticky notes, is there anything else or other methodologies that you'd like to use in personal engagements?

Speaker 2: I like white boards. It depends on what the goal of the meeting is and all the tools those are just to facilitate. And I think it's just really have a conversation with the clients and figure out a way to do things, whether you use the whiteboard or speaker or you don't use anything, you should use the way that works the best depending on the situation.

Speaker 1: So then for remote engagements, how do you structure those? Is it voice only? I mean, we are currently on camera. Do you screen share? Do you make it interactive? Anything that works really well for you in remote engagements?

Speaker 2: I really am flexible if it's a one on one, I do camera because I think it's good to see the face. But if it's a group meeting and most people are not on camera, I don't turn on my camera. I really respect people's advice of turn on or not turning on their camera. Like I think like if you do camera meetings all the time, you feel exhausted, too. If no one turns on their camera, I also do not turn on my camera.

Speaker 1: And then you said that you really like working from home. So what people, or what characteristics do you think work really well for remote engagements?

Speaker 2: Like you are more flexible. I'm not saying to try to be lazy or anything, but when you go to the client office, I'm pretty sure there are times, like this day, it's actually not a busy

day for you but then because you're in the client office with a bunch of Accenture people, you also want to make sure you look busy. Let's just assume a scenario. Like you're super sleepy in your conference room. You have to pretend that you're not sleepy but in reality you're so inefficient and you're really sleepy and then at home you go to sleep and then go work again, and you're actually more efficient when you're not asleep. So I think that kind of flexibility is really great at home and it feels like you have the freedom to choose how you allocate your time, right? As long as you get your stuff done, the rest of the time is yours. You don't have to fit an eight hour, 10 hour timeframe if you can get it done in five hours, then the rest of the time you can do whatever you want. So that's what I really like about working from home.

Speaker 1: And are there any tools, methodologies, activities that you like to use in remote engagements?

Speaker 2: Just office tools.

Speaker 1: Okay, that works.

Speaker 2: I do use Microsoft OneNote. I use that quite a bit and I do list my to- that I will check every day and move some items if I think it's more important. My to do is actually very long. Some of them, I will never get to but I just put it there. And there's also something really good about this. Like say someone asks you to do a bunch of stuff and say that person's request is actually not reasonable instead of telling them that no, I'm not going to do it. And then they're going to be off and you tell them like, Hey, here are the 20 things that you told me to do. I'm going to do it. It's just I'm going to prioritize certain things. And so I think that's also a good way to manage some boss who will give you a bunch of stuff. And sometimes they even forget themselves.

Speaker 1: I agree with that. So then we are actually shifting focus again and looking forward. So I have five more questions. The first is how should we use our buildings, our innovation hubs, and such. Do you think there's anything we need to change about them?

Speaker 2: I'm pretty sure Accenture has gotten rid of a lot of the office spaces, so it's really probably the minimum they have. I foresee we're going back to the office pretty soon. Maybe not every day, I think it's going to be a hybrid. So the office is still very important as a networking space. Like for example, there's an office in San Diego. I've never been there, but I really want to go there someday to meet some folks in Accenture. I think the way they are doing it right now is pretty good, not an assigned desk. You go there and you reserve a desk or reserve a office. I think the way it is right now works.

Speaker 1: Perfect. And is there anything we should do to continue to strengthen our company culture? Do we need to have more happy hours, gift giving, Christmas parties, anything like that?

Speaker 2: There are a lot of things that I think as a company we can do to make people's life better. I think Accenture is actually better in a lot of ways. One thing that I suggest is that maybe people should be more forgiven towards each other, because sometimes you see on projects one analyst's not doing well or consultant's doing well. Like we sometimes make them feel so bad and I just feel it's not necessary. We can't expect everyone to be a Superman and know everything. We should be more forgiven when we see other people make mistakes and because we were there ourselves. So I think that we can and definitely do better. I'm on a team and I know some folks are struggling and they feel terrible about themselves. And on top of that, if we criticize them more, they feel more terrible. I think that causes a lot of mental issues. I think we should be more forgiving and give people more opportunities and not feel like this person sucks just because he or she did this one

thing once. So I think that we definitely can improve. I think you're actually doing pretty well in terms of respecting work life balance and do not put meetings on people's calendar at 5:00 AM or at 6:00 AM in the morning. If anyone puts a meeting I'm having before eight, I don't attend those meetings. I just make it very clear that here are my boundaries and I'm not a morning person. I do not join any meetings before eight on teams that I'm on. People respect that. I hope most teams respect that. I think maybe I think you can make it more clear that we respect your boundaries and if you get your stuff done, then you're good.

Speaker 1: Yeah, that was perfect. You also actually answered my next question. I was going to ask your number one advice that you'd give a person currently managing a client engagement, but it sounds like flexibility, figuring out the client's need or your team's needs and being more forgiving and making sure you are supporting one another instead of criticizing, right?

Speaker 2: Yeah. I think that's really important. Yeah.

Speaker 1: So then what makes a client engagement a success in your opinion?

Speaker 2: What does success mean for a client engagement? It depends on what the project is, for example, this project that I'm on is doing product development. So if this product can launch within a reasonable time frame and not too late from the original timeline. So I think that's success and, and but it really depends. It depends on what the project is. Like some of the projects are really vague. Like for example, I'd be on a lot of projects that to do the really high-level strategy assessments about IOT or 5G, those kinds of projects are really vague. The success metrics I guess, is whether the executives took your idea. But even if they didn't take your idea, you can't just say that's a failure maybe some of the

data or analysis that you had forces them to rethink and they came up with a different conclusion. So I don't know, it's really hard to say what is success or not success?

Speaker 1: There you go. And then, any last pieces of advice or thoughts that you would like to share on the entire workplace setting topic?

Speaker 2: Something that I suggest, be more forgiven, more flexible and support people instead of criticizing them too much.

Speaker 1: This is perfect. Thank you very much.

## **Appendix B12: Manager 2**

Date: Vik

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes, I do.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: First I'm going to ask you about your experience in the workplace. So how long have you worked in consulting?

Speaker 2: How long have I worked in consulting? Overall, roughly 10 years.

Speaker 1: Okay. And how many of those years have you worked in person and how many remote?

Speaker 2: Eight in person now going on two remote.

Speaker 1: Okay. And have you detected any changes on yourself on new habits that you've developed since working from home?

Speaker 2: Have I noticed any changes in habits? I try to be a little bit more organized than I been in the past. That's probably one big change. I definitely tried to focus on my ergonomics for

working as well. While I was in person, I had the opportunity to work with a client that had standing desks as an example. I really got used to that so working from home, I had to make some changes for my own office environment to better support that.

Speaker 1: Perfect. And then how do you prefer to engage with coworkers? Would that be remote, in person, a hybrid?

Speaker 2: I am a little bit of an introvert. I'm okay not seeing people for a long time but it's always nice to be able to converse and see people and having the active participation of being able to ring somebody up is really nice and handy. But what is challenging is you can't walk up to someone's desk and just say, Hey, do you have a minute? And you have no awareness of what they may be working on, in person you can kind of walk up to them and see if they're busy, walk away and then come back to them. Whereas when you're remote, it's a little bit more challenging to just kind of tap on their shoulder. Did that answer your question?

Speaker 1: That did, and then that would probably be the same for client work, right? So remote is okay, but seeing the client every once in a while would be nice?

Speaker 2: Yeah. So it would be useful for that interaction, if you're on a call and you're not on video, you can't actually gauge people's reactions. I find it that when you're on a call and people are silent, you don't know what to make of that necessarily. Whereas if you were in the room with them, you could see maybe if somebody's thinking about it, you can kind of see their facial reactions, see maybe if they're taking notes, you just don't have that opportunity working remote. So pros and cons for both approaches. I certainly would prefer being in front of a client to be able to, more than anything else, build that rapport. When I'm remote, I try to take a little bit of opportunity to build rapport by talking about things in calls, whenever the opportunity presents itself, to learn a little bit about them,

hopefully share a little bit about myself and that way at least they feel they are comfortable engaging, they feel comfortable speaking about what they are concerned about, what they're not concerned about.

Speaker 1: That makes sense. So in this next phase, I'm going to walk you through seven different scenarios that we encounter with our client. And I would just like to hear about your ideal response to the situation. So scenario one, you're meeting a potential client and would like to explore if there's an opportunity for a new project. Who's your client stakeholder? So what level of seniority are they and how would you engage them?

Speaker 2: Meeting the client for the first time... Definitely set up a meeting either remote or in person, short introduction a little bit about myself, a little bit about the effort that we're about to embark upon and some just light mixed steps in terms of like, Hey, here's what I or the team plan on doing next? You know, we hope to engage with you in this manner and if they're the wrong person to be engaging with, I hope that we've conveyed enough of our scope that they can kind of redirect us if needed, but hopefully that's the right person and we're going to continue to work with them going forward. But that initial meeting is to talk about it that way.

Speaker 1: Perfect. And then now you're working on a proposal for this client, who's your target audience and what do you do to successfully close the deal?

Speaker 2: Who's my target audience for a proposal and what do I do to successfully close the deal? My target audience is, to simplify is the budget holder, whoever owns the budget and I'm looking to find out, from either our internal teams or from the client themselves, what are their needs, understand what their needs are and understand what our capabilities are and then scope in the right level of work that that I would think would meet their needs, but then also fit within a budget, which I think they may have. But I would expect

to do some homework on our side before putting any kind of raw numbers in front of them.

Speaker 1: Perfect. And then now you're actually kicking off this new project who's attending the kickoff and how would you like to structure the meeting?

Speaker 2: Our kickoff would include the project team, our budget stakeholder, and then whoever the business stakeholder is. And I would open the door to invites. I would request that they forward the invite to any additional members from their side of the house that would be of value to attend that call so that we can start building some relationships early on.

Speaker 1: Perfect. And during an active project, how do you prefer to engage with your client? Do you think it varies by stakeholder?

Speaker 2: I think it definitely varies by stakeholders. Some clients love to have daily touchpoints, others are more weekly driven, and it just depends on what fits their needs best.

Speaker 1: Okay. And then when you think of important milestones or the end of an engagement, how do you present your findings and who is attending the meeting?

Speaker 2: Business stakeholders, budgets stakeholders are both in attendance. I would invite maybe some secondary stakeholders as well, people that we've worked with alongside the engagement. So I'd given them an opportunity to provide feedback as well. That's them, from our side the product team who most heavily contributed.

Speaker 1: Is this in person or remote?

Speaker 2: Ideally, I think it would be in person but it depends on the client needs.

Speaker 1: Okay. And then you believe that there's potential for a follow up project. How do you like to communicate that with your client and if they're different, how do you communicate with your client versus the person giving the final sign off?

Speaker 2: Potential for further work? How do you communicate with the client? The first thing I would say is that throughout the engagement having these constant conversations where do we think we need to action next steps, we believe our effort is going to be this line of the markets, here's where it's going to end but there's some opportunity for us to examine further where we can help, let's carry that conversation going forward and if you really do see the value in our work, we're happy to continue those discussions. I would probably work with the business stakeholder first and then come back to the business budget stakeholder if they were separate.

Speaker 1: Okay. And then the final scenario, outside of engagements how do you foster existing client relationships?

Speaker 2: Yeah. I mean, generically, connect with them on like LinkedIn, keep abreast of what their industry's doing, what their company may be doing, share things to them. "Hey, I thought you might find this interesting", ring them up now and then say here's what we've learned the past year. If you think this is of interest to you, would you like to talk a little bit about it? Having lunches with them, obviously reaching out when appropriate, but keep keeping a relatively safe distance as well, because you have other clients as well that need attention. You can't just be focused on just one or two people. Right. So try to spread your attention where you can when you can.

Speaker 1: Perfect. And do you think there are other relevant situations that you encounter with that I did not touch on?

Speaker 2: Other relevant situations with clients? I mean when you think of one industry, you know what one industry's doing, you want to definitely share what other industries are doing as well. There's a big push from definitely the clients who see themselves as being on the forefront of things. They don't want to get left behind. They want to be the leaders in the

space. And typically the leaders in the space look around and see what others are doing so they can learn from them. They are not content to sit on their laurels. So they will take an active approach in being learners. So if you have the opportunity to share to them, you want to share those kind of things to them. But outside of that, you want to try and remember maybe some personal things like kids to build rapport, right?

Speaker 1: But these are not like specific situations, right? This is more about fostering and keeping the client engagement alive, correct?

Speaker 2: My apologies. I was thinking once your engagement ended, okay.

Speaker 1: No, that's a question. I'm saying what you are currently presenting are more ways in which you can keep their client relationship going. It's not a specific situation. I'm looking for a specific phase in the relationship between us and our clients. Is there an additional one that I have not touched on?

Speaker 2: I mean, it depends. I would say apart from professional relationships you can get into personal friendships over time and as an example at another client I worked with a gentleman over there who I worked very closely with on the pilot and he and I now and then have lunch. And we don't talk about work. We talk about our lives. We talk about our interests. I've talked about visiting him in Oklahoma. So, if you get so lucky enough to be able to build a relationship like that, it's a nice thing to have that there's a bond, I would say. You don't always get to have that opportunity with clients, especially if you are going from project to project, to project. Now, if you're on an account for several years, you could build that rapport outside of work. The cliché of going to each other's kids, bar mitzvah, things of that nature. And then celebrating success, you could celebrate their success by industry awards, things of that nature, those would be other professional type

engagements that don't happen on a specific project. So you can honor them, you could go to things, you could support their charities as an example.

Speaker 1: Perfect. All right, then we're going to shift focus a little bit and talk about your opinion on in person versus remote work. So, could you describe how you like to structure in person engagements, would it be Monday to Thursday week travels, dinners and special activities?

Speaker 2: Are we talking about project work or are we talking about outside of project work or both?

Speaker 1: Both, but it's more about how do you structure in person work as a whole?

Speaker 2: Okay. In person work as a whole? It depends on the client. Some clients prefer structured approaches where they want to have a touchpoint X number of days a week. So you structure your time around that.

Speaker 1: If you got to lead a project right now that was in person, how would you structure the in person part of the engagement?

Speaker 2: How would I structure it? I would structure it, given COVID, I would structure it in such that I minimize contact as much as possible. I do not know the awareness of people's day to day routines, who they're exposed to, what their personal habits are necessarily. So I would limit interaction to a minimum in person, but I would supplement that with more interaction as remote, so more meetings to show visibility. To show that engagement.

Speaker 1: Okay. And then do you believe that there are people that especially benefit from in person work and who is that?

Speaker 2: Yeah, certainly. People who would benefit from in person work, those who tend to get the best out of collaboration in particular, like they could feed off of other people in person, definitely works better for them. Everyone has a different style of working. It's when we talk about leaning into your strengths, right? Some people will feed in into that

quite easily. There are other people who you can leave them alone and they just go on autopilot and get the work done and it's brilliant and then there's others that you definitely have to have a lot of participation with, be there with them to either work with them or help guide or learn from. I think that's one thing that I definitely do miss in person is I was lucky enough to have the opportunity for early in my consulting career where I sat here and my boss sat right there and I could just turn and ask questions. That immediacy is not present for me today. Right. So I think, definitely it can benefit people.

Speaker 1: Okay. And are there tools, activities, or methodologies that you particularly like to use in in person engagements?

Speaker 2: Whiteboards, love using whiteboards, love drawing ideas, love mapping things out, scribbling, getting things in a visual of an idea is a powerful thing. Just talking about stuff, its limits, but once you get a visual, you can take a picture of it. You can share, you can get feedback, there's no amount of endless possibility there.

Speaker 1: Perfect. So now I'm going to ask you the exact same questions about remote work. So how do you like to structure remote engagements? Would it be voice only, camera and screen sharing, interactive?

Speaker 2: All of the above, but it also depends on my energy levels. There are days where I don't feel as energized, maybe haven't had good sleep because the kids crawled in the bed. So I'm not going to be on camera because I got a baseball cap on and I'm not as professional looking. But I definitely do like being able to share and talk through something and work hand in hand on something. One thing that I struggle with is what is the right balance of showing your work? Do you show it when it's complete or do you show work in progress, which is really work in progress or do you show polished work in progress? So there's a

balance we have there and I do struggle with that. But that would be the short answer of that. Maybe not so short, but yeah...

Speaker 1: No, this is perfect. And then what people do you think especially benefit from remote work?

Speaker 2: Number one people who have, in times of COVID, their health is at risk or they have other family members whose health could be put at risk. They benefit from that. Certainly, I think that a lot of people benefit from remote work, just having the time back on not having to drive in a city like Houston. I would spend upwards of two hours of my day just driving. It's nice having that time back I can devote it to solving problems where I wouldn't have the time to solve problems, either work or personal. So I think people who just need the time get that time. So those are the two things I can think of right off the top of my head.

Speaker 1: Perfect. And then tools, activities, or methodologies that you particularly like to use in remote engagements?

Speaker 2: Screen sharing, collaboration tools such as, I'm forgetting the name of it. Is it a Mural board? I wish I actually had a tablet that I could interactively use as a whiteboard and I could show up for others. I just don't have the tool for that. Trying to do this with a mouse on a three year old laptop just doesn't work. Definitely those kind of tools, anything that I can improve the physical sharing capabilities. You know, when you're in person, you can pull out a piece of paper, print it out and highlight things and say, look, here's what we need change. Conversely what's powerful about remote working and sharing through like Teams and Office 365 is that we can be in the same document working at the same time and talking through changes and those changes happen in real time faster, there's minor drawback is technology is not perfect. There's been plenty of times where things broke

so maybe it's always good to have one person driving and the other person kind of steering, so to speak.

Speaker 1: Perfect. And then we're changing topics again and are going to talk about your opinion on the future of work. So how do you foresee our projects to be structured going forward?

Speaker 2: I would expect more global teams. I would expect a lot more competition from a knowledge point of view. No skillset is truly safe apart from maybe some specialized things that take years of experience, but I think a lot more of a globalized workforce. I don't have to be located necessarily where the client is located. I can provide my expertise to them from anywhere on the planet and I think our clients are going to see some value in that as well and say, well, if I want the best of the best, I don't have to worry about what's best in my city. I can actually go find the best anywhere. And I mean, to a degree they've done that with their own operations. Now they're going to see that from all parts of their value chain. And we're part of that value chain, too.

Speaker 1: Perfect. And then personally, what would be your ideal work structure?

Speaker 2: Four-day work weeks? I mean four-day work weeks would be a good start. I think there's enough work to go around there's enough people who can provide value as well. I think there's a lot of talent in the world that isn't given the opportunity today because there's not enough work, but in reality, there's plenty of work. We are just working more than we should be working. We are supposed to work only 40 hours a week, and I think a lot of us are working a lot more than that. And I would rather scale that back and be much more focused with the time that I have and then work out some sort of schedule with our peers where Friday may be off for me or Monday may be offered to me or vice versa. And we get these three-day weekends. And hopefully that expands over time in a generation

from now everyone's only working two days a week, but everyone's working and we're all doing great.

Speaker 1: That would be great. So then next question is, how should we use our buildings? So innovation hubs, offices, how should we use them?

Speaker 2: As collaboration and innovation centers for not just our clients, but our own teams, need that as well. The increase in our ability to communicate ideas definitely goes up when we're in person.

Speaker 1: Perfect. And then how should we continue to strengthen our company culture? Should it be office days and Christmas parties, gift sending?

Speaker 2: With the size of our company and the distribution of our teams makes this difficult. When we talk about like building a cohesive family structure within the company, I think that's a little bit challenging. Certainly I came from a 80 person company to half a million people. That 80 person company, every Friday we told our clients we're not going to come into the office at our client site. Every Friday is devoted to our company. So we would come in and we would either work on our client stuff, but then the rest of the time we'd be able to interact with the rest of the group and really share what each of us were working on, like bounce ideas off of each other. It was really valuable having a dedicated day within the company where people can come in and kind of collaborate on just random things, not focus on client work, but like google 20% of your time. I think that would go a long way to improving how I can drive my own value, my own career inside the firm. And give me that time so I can go find the people who can help me get there. You need that time to go find the coaching. A day a week would be huge to all of us. I mean, plus ones are again telling us that we need to work more than 40 hours a week. I want to come back to

that. I know you're going to say that it's a separate thing, but I would come back to the question of four-day work weeks. Well, I think there's enough work for everyone.

Speaker 1: Yeah. The question is really more targeted at strengthening the culture, but I think you still answer that. Getting together and collaborating with your own peers, too.

Speaker 2: Yeah. Yeah. Collaborating and setting the direction of the firm in ways that I wouldn't necessarily get the opportunity to, unless I was given the time to do it. If I'm driven only by my CCI targets, I'm not going to be incentivized to actually go build something new. Even though I see the opportunity.

Speaker 1: Yeah. That makes all right. I have three final questions for you. So, number one, what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Number one advice, managing and engagement... Make sure you do two things. It would be a two parter, make sure you're taking your client's temperature but then also make sure you know what your team is doing. Don't step away and assume everything is hunky dory, be there to provide support to your team.

Speaker 1: Perfect. And then what do you think makes a client engagement a success?

Speaker 2: I think what makes client engagement success is the client is happy that you delivered not just to expectations, but above expectations and they would continue to work with you in the future, that you've staked your reputation on the work and your reputation will carry you forward to future engagements, not just with this client but then also beyond the client. So that client is going to talk to other clients and also say this team did great work for me.

Speaker 1: Perfect. And then, do you have any last pieces of advice or you or thoughts that you would like to share about workplace settings?

Speaker 2: Advice to whom?

Speaker 1: General?

Speaker 2: My advice across the board to clients and our firm and to our peers, our colleagues, everyone, do not underestimate the level of technology needs you have in order to do the work that's necessary in this day and age. And this goes from when the pandemic started, if you didn't have an office 365 account, you were caught flatfooted you had to scramble to go set that up to ensure that your entire organization could work remotely. So companies that were not prepared for that are peers who didn't have a good internet connection suddenly had to figure out. I remember talking to a friend of mine several years ago, he worked for a company that did photonic chip sets for like cable modems and data centers and he said to me at that time, several years ago "I can't imagine a need for people to have a gigabit con internet connection". And I was just shocked. I was like, you're in this space and you don't anticipate the need for data. So for Accenture do not underestimate the need for these things, right? Our laptops have got to keep up from a performance point of view, we cannot skip on investments in technology.

Speaker 1: Perfect. Thank you.

### **Appendix B13: Manager 3**

Date: Mariana

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: Great. So in the first section we're just going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: Since 2014. So about eight years.

Speaker 1: And how many of those eight years have you worked in person? How many remote?

Speaker 2: Remote would be I guess these past two years and the rest have been all in the office.

Speaker 1: Okay. And have you detected any changes in yourself or new habits that you've developed since primary working from home?

Speaker 2: Yes.

Speaker 1: Do you want to give an example?

Speaker 2: I think the biggest habit is basically needing to set some structure to my calendar, into my schedule. And that means literally blocking off chunks of time where essentially people can't contact me because I need to separate home from work. Previously in my consulting experience, when I was traveling, I kind of considered myself being available whenever was needed because I was technically on site. I was away from home and then actually my first two and a half, almost three years in consulting I was staffed locally. So I would go into the office, into an Accenture office, and then I was able to go home. But still that was a project where I was working 10 hour days also because home was just a 30 minute train ride away. But with remote it's completely different.

Speaker 1: I agree. And that's a pretty common answer. I think a lot of people are going through that. So when you think about engaging with coworkers and even clients, how do you prefer to do it? Would it be remote, in person, a hybrid?

Speaker 2: It depends on what we have to engage about, for example, if it's with specifically clients, I think it always works better face to face because it's much easier to get their attention. Plainly it's much easier to get to their attention and also easier to kind of relate with them

as well when you're in person. I've worked in a lot of small teams and also big teams as well. And I've worked on big, big teams that have been in the office every day, in big teams that have been remote for the past two years. And to be honest, some of these interactions, I don't think they necessarily need to be in person.

Speaker 1: Got it. It actually feeds really nicely into the next section of the interview, because I'm going to walk you through seven different scenarios and would like to hear how you would ideally respond to the situation. So it's not about the COVID constraints, it's more about if you could choose, how would you engage?

Speaker 2: Okay, cool.

Speaker 1: So in the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project, who's your stakeholder and how do you engage with them? is it an email introduction? Is it meeting someone at a happy hour? Is it having a workshop or having a dinner, anything that you can think of?

Speaker 2: I would prefer a face to face introduction with that person, not necessarily a dinner but that kind of setting, a laid back setting would be preferable. But not a dinner I'm not going to have that much to talk about in our first interaction. Some sort of laid back setting, it doesn't necessarily need to be in the office maybe grabbing a lunch with a prospective client or a new client. I think that's a good setting.

Speaker 1: Perfect. And then you are working on a proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: So if I'm working on a proposal for this client, definitely the internal folks that I'm working with. I mean it's very hard because the last two years have kind of blurred the rest of my consulting experience, we've been doing this remote for a while. I think the experience that I had with working with the federal team, I think they have a great process where

you're having multiple day cadence. You have someone that's leading the proposal. It's kind of clear delineation of responsibilities. That's how I like to work on proposals. And then also you have someone that is clearly doing the interfacing with the client as well. I think it makes sense to have one or two people that are doing that, that are able to kind of come back to the team and feed the information because ideally you do want to have a team of experts that are able to put some proper contributions to the proposal that we're working on.

Speaker 1: This is perfect. So then you're kicking off a new project, who's attending the kickoff and how do you structure this meeting?

Speaker 2: So kicking off a new project we have the team that's there. If it's a small team, I would have the entire team there. If it's a large team, I would maybe have just the leads of the team that are there with the client as well as with our Accenture leadership as well. The way that I would kind of structure the meeting is first do introductions of the team. What everyone's roles are; if you need something, this is the person that you go to, then we will go over our understanding of what the scope is and what the deliverables are for the engagement. And then after that, we would save the rest of the time to kind of talk about if there are any particular priorities that the client has or anything that they would like us to get started with or if there are any adjustments or things that we need to switch around for the engagement.

Speaker 1: Perfect. So then how do you engage with your client during an active project? Do you have stand up calls or anything like that?

Speaker 2: Yeah, so It depends on how busy the client is and it also depends on the type of engagement. I think at least you have a weekly cadence with your client, at least, if it's an engagement that requires a lot more collaboration and partnership as well as feedback

then going up to two to three times a week with a client is ideal. But at least a weekly cadence.

Speaker 1: Got it. Perfect. And now you're at an important milestone or at the end of an engagement, how do you present your findings?

Speaker 2: Yeah, so I typically like to revert back to what we agreed to in the statement of work, how we structured that statement and worked because, I take it as all right this is the way that we both agreed on understanding what the final product will be. I am a big fan of creating work product packets, mainly because I like having things on paper as proof that they're done. For example, a work product packet would have a section for each of the deliverables and be able to show, this is what was intended, and this is how we delivered it and this is the feedback that we got. Basically, have that packet put together, ready to send to the client, but also have a meeting or a couple of meetings to go over that packet to also get sign off that everything has been met.

Speaker 1: Perfect. And then it would probably be the same attendees that you had in the kickoff, correct?

Speaker 2: Yes, it would be the same attendees of the kickoff.

Speaker 1: Perfect. And then if you believe that there's potential for a follow up, how do you communicate that?

Speaker 2: I would actually do that like maybe midway or three fourths of the way through the current engagement. Basically, it would really depend on have we identified maybe some gaps that are within our scope that we may need to address in a next project or a lot of the times we already have in mind that this is what the phase two will look like, and we're using this initial phase to prove out the need for a second phase. So we would start working on putting together essentially another proposal midway through our current

engagement, start to talk with the client about it and start to not necessarily plug the follow on but start to also gather requirements from them. Kind of like how we did for the initial proposal. So by this time when we're ready to present it, it would include some initial feedback that they've already discussed.

Speaker 1: Got it. And outside of engagements, how do you foster existing client relationships?

Speaker 2: For people that I think I can connect with, I try to first always connect with them on LinkedIn for the social media aspect of it. I also try to have meetings where it's not necessarily focused on the engagement. It's more just checking in on what's going on. How are you doing, basically try to form some sort of personal connection with them and also learn more about how they are and the way that they think because that can go a long way. For example, I emailed a former client of mine the other day or I messaged them through LinkedIn and I wanted to just set up a quick sync and I picked Lincoln in particular because I didn't want to necessarily talk about anything Accenture related, even though it could be brought up, but I did want to have a more personal conversation.

Speaker 1: This is awesome. Do you think that there are other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: I think maybe situations where the client is not necessarily happy with the work during the engagement.

Speaker 1: Do you have any go-to tips or is that personal conversations?

Speaker 2: I would go back to, and this is why I mentioned to have everything written down and everything on paper and also the weekly cadence, because I want to make sure I have some continued reassurance on my end to end to make sure that we know exactly what's been agreed to. I want to be able to manage expectations as well. I think that's the biggest thing because if you go too long without communication or if you don't agree to this is

what the deliverable is going to look like. This is what we're going to do to that deliverable, if we don't do that, then there's grounds for, oh, I didn't necessarily understand what was going on that makes. I have had a situation where a client, I don't necessarily understand what their problem was, but they were concerned that we weren't necessarily meeting the deliverables that were within the statement of work in particular. But luckily for our side, I was documenting that every step of the way. So we were able to essentially highlight sections of we did this, this, and this. That quickly got resolved.

Speaker 1: Do you think there's a difference in resolving these in person versus remotely?

Speaker 2: Absolutely, for that situation we were in person and I think it's much easier to level with people in person rather than remotely and via Teams or Zoom or anything like that. Especially, for example, like how we're talking right now where we don't have our cameras on you kind of lose some emotion and you lose a little bit of connection actually especially when you're trying to come to a compromise or agreement about something, it's much easier to do that in person because you also have the ability to capture those non-verbal cues as well from someone else.

Speaker 1: Right. I think this could lead into the next section. So I do want to hear your opinion on in person versus remote work and it's really high level, but so the first question is; could you briefly describe how you like to structure an engagement. It's more about is it every week Monday through Thursday, are you focused on special activities and dinners? How do you think about it?

Speaker 2: I mean, this is also depending on the type of engagement. But just say standard, the way I would like to do it is to be in person for the kickoff meetings as well as the wrap up meetings and any other important or urgent ad hoc meetings that come into place. But I think being able to kind of be remote for three weeks out of the month and then onsite

for one week would work for an engagement. The reason why is, from my experience and it varies a lot of the times, when you're on site and you're meeting, you're basically focused on meeting with the client stakeholders. You actually don't get a lot done. So imagine doing that going back to the Monday through Thursday, every week you don't necessarily get a lot done. But if you try to compress that time into having a full week, Monday through Friday face to face with the client, that'll kind of help balance off the at client engagement as well as work life balance. And in my opinion, I lean more towards the work life balance part of it.

Speaker 1: This is perfect. Do you think there are people that especially benefit from in person work or also from remote work?

Speaker 2: Yeah, I think so. I mean, I think there are people that need to be around other folks in real life to help bounce off ideas and just collaborate in an office, whether it be that's how they work best or the remote environment that they have set up is also not conducive to their pro productivity as well. So that's why I'm a friend of the hybrid model to help accommodate for either person.

Speaker 1: And are there any tools, activities, or methodologies that you like one in engagement in in person engagements and two in remote engagements?

Speaker 2: Say that again.

Speaker 1: Do you have any tools, activities, or methodologies, anything like stickies on the wall versus remote screen sharing that you like, so one for in person and two for remote engagements?

Speaker 2: I did notice that when I was in person it also depends on the setting. I've been in settings where I was on an in person engagement and I had a cube where I was traveling. So I was able to put stickies down. I used PostIt notes a lot. I was able to have notepads and stuff.

I have reference material in place in my cube. I've also been on in person engagements where I did not have an assigned location, so I relied heavily on making sure all of that stuff was digital which sucks for me. In particular remote, I can kind of do what I want, but I find myself all over the place to be honest. I go between using physical notes, like my post-its, and using that in my remote office. But then also I do want the ability to migrate to another place if I need to work, so also being able to rely on digital. So, and I think what I've settled on is sticking with the digital notes as well, just so I don't lose anything, but I just need to make sure that I'm a lot more organized with it. So that involves using one tool instead of being spread across OneNote, the notes app, Microsoft to do all these different things. I'm currently struggling with it, as you can tell.

Speaker 1: I mean, I think structure is one of the biggest things, in multiple different ways, that people are talking about now that we are working from home.

Speaker 2: Yeah, definitely.

Speaker 1: Do you have an opinion on camera on, screen sharing? Anything that we can only do while we remote?

Speaker 2: I guess I've never thought about this, but I think I would have an opinion as far as like screen sharing and things like that. I think it's actually awesome. If you think about in the office as well, you do screen share as well when you're trying to project to a TV or something like that. So that's how I kind of see it. It allows someone to follow along and for someone like me, I'm a visual person as well. As far as camera on and off, it depends on the type of conversation that you're having. If you're talking to someone that you talk to all the time and it's a regular cadence type of meeting, then I don't think the camera on is necessarily. But if you're having more of a more serious conversation, or if you're trying to do some sort of ideation or brainstorming or collaboration or something like

that, I think camera on helps. Another situation that I've found that camera on helps is when you're having a disagreement about something. I don't know why I did this, but I turned my camera on, I guess to kind of convey my facial expressions and the importance of what I was saying. And I guess I would note that I noticed the stark difference between the rhetoric I was hearing with the camera on versus the camera off.

Speaker 1: One thing I've heard a lot is that a key issue is to remind ourselves that we're all human because it's easy to just hear a computer voice pretty much. I know it's your personal voice, but it still doesn't feel the same, it's easy to forget that there is a human that was feeling sitting across from you that you can't ignore as much when you're in personal.

Speaker 2: I think that's exactly it.

Speaker 1: I have four final questions. One, is there anything that you think we need to do to strengthen our company culture? Is it office days and Christmas parties? Is it gift giving? Is there anything you can think of?

Speaker 1: If not, that's totally okay too.

Speaker 2: No, I mean, of course there are things I can think of. I just overall I think whatever it is, be intentional about whatever you're trying to do with strengthening culture. For example, I think it was last year or maybe in 2020, you know there was a note about not having meetings on Fridays. I can't remember if it was not having internal meetings on Fridays. I think folks did it for like a week max, but then we went back to how things were. So if you're going to do something like that, be intentional with it. I use that as an example because whatever else policy that you want to put in place I don't think it'll mean anything if there's a track record of not sticking to it.

Speaker 1: I agree with you. Then the next question is what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: What I was thinking around is manage their expectations portion of it. And then also meet with that client in person, if it's a remote engagement meet in person with them at least one time, because you will not have their full attention on remote meetings, but you will in person. Also, have diverse people on the team. When you have diverse people of the team, they're going to have different ways of interpreting conversations or interpreting the tone and mood of the conversations that are going on. And this can be super helpful because you're going to void. Thinking or having a one track mind, down a single lane, you'll have multiple voices from diverse people that are come from all different types of experiences that are able to lend to the collective opinion of, this is the tone or the mood of the client and the engagement in general.

Speaker 1: This is great. Then what makes a client engagement a success in your opinion?

Speaker 2: When you have the client in lockstep of what you're doing. So for my successful client engagements we meet weekly and in these weekly meetings we're not only reporting on what we've done, we're actually having discussions on what the future outlook is and what the future implications are from the work that we're doing in our current work, in our current engagement. That shows that you already have that baseline of, yeah, we did that. We understood, we know why we did that, moving forward where do we want to be? Or what do we want this to look like in the bigger picture? I think once you're having those conversations and you're having them regularly, I think that shows for a successful client engagement, because at that point you're fully collaborating on what you're doing.

Speaker 1: Perfect. And the final one, do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: Let me think. No, I can't think of anything.

Speaker 1: Perfect. Thank you so much.

## Appendix B14: Manager 4

Date: Mariana

Speaker 1: I'm conducting these interviews for my DBA research and would to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: So then first we're going to talk about your experiences, how long have you worked in consulting?

Speaker 2: About eight years now.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: Six years in person. Two years remote.

Speaker 1: Okay. And have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: Yes.

Speaker 1: Would you want to give an example?

Speaker 2: I think, and even during the time that I been remote, it has changed. But I think in the beginning it was the lack of schedule, from personal things as when I had my breakfast all the way to past my working hours. There was a structure before, having to commute in and out of the office, I think even that has changed a little bit and it has gotten a little bit more structured now, but I think it has definitely taken a lot of effort to put those boundaries and define a schedule that works.

Speaker 1: That makes sense. How do you prefer to engage with your coworkers and also clients, would that be remote, in person, hybrid?

Speaker 2: I think a hybrid. I definitely don't mind the remote virtual connects, except when there's more of a brainstorming or a working session. I think those get tiring when over the phone. For those, I still prefer the old school getting in front of a whiteboard and doing it in person.

Speaker 1: Perfect. This actually very nicely leads into the next section. I'm going to walk you through seven different situations that we encounter with our clients and would to hear how you response to the situation. So in the first one, you're meeting a potential client and would to explore if there's an opportunity for a new project, who is your client's stakeholder and how do you engage with them? So it's more about are you reaching out via an email or LinkedIn, are you meeting with someone in person and then your schedule in person dinner? Or how do you start engaging with someone?

Speaker 2: Ideally today, I think ideally first meet up. I actually don't mind it to be in a call. I think it helps me to keep it short and sweet first, I would ideally use the camera though. So there's at least some component of engagement there. And from there, I think it's when I would prefer to do some in person. A dinner or maybe a more casual meetup, it could be in the office or whatever, or at their site. But I actually do think, I've never been asked this question, for that initial meet and greet I don't mind it to be on a call so that there's a little bit more control over keeping it short and sweet, building the relationship and taking it from there based on the nature of that relationship. If this is a very social person, then maybe we'll go out to dinner. If it's more of a structure, more professional, then we'll do a quick meet up in the office.

Speaker 1: This is perfect. So then in the next phase, if you're working on a proposal for this person, who's your target audience and what do you do to successfully close the deal?

Speaker 2: I think having frequent connects and I think at this point they should be a combination. I actually do work on a lot of proposals and I to have at a minimum weekly connects with my people, depending with my stakeholders, depending on how fast of a turnaround it is. So it could be from daily to weekly connects while I think it's more effective. So at times to have them virtually because of the nature of our work today, I do to sprinkling some client visits, so getting to their environment. I feel that provides us a more clear understanding of how we should be approached that piece of work or the solutioning.

Speaker 1: Perfect. And then now you won this project, of course. How do you structure the kickoff meeting and who's attending it?

Speaker 2: Ideally, because of the nature of where I work, I'm out of the Houston innovation hub. I love to have kickoff meetings at the hub, so we shape them a little bit a workshop type. So ideally I want people at this point face to face, I think the core team, key stakeholders, and any additional leadership oversight that we're having from the Accenture site need to attend. And for that reason, I to have it in person and the form of a workshop because I feel to do our proper kick-off, there's different sections. Maybe initially we have more of a beat of greet that's where everyone is involved, then we can dismiss maybe leadership. And then we stay to do more of setting the guidelines and expectations for the team. So have an agenda for it. Ideally, I think they should take longer so that we set the stage for the rest of the project. I prefer them to be in person.

Speaker 1: Perfect. And during a project, how do you engage with your client then? Does it shift?

Speaker 2: I think it's also a hybrid because it depends on who I'm speaking to. I just really performed as the scrum master or delivery lead. So my weekly meetings with my stakeholders are

short and sweet, they're over the phone, but I also very much to engage end users or people from the business and sort of interview settings, those, I to have in person at the client site and then we'll have bigger working sessions that should be hosted in a friendly environment.

Speaker 1: Perfect. And I think you were about to get into this too, but when you think of important milestones or the end of an engagement, how do you present your findings and who is attending the meeting?

Speaker 2: I use a very agile approach. Who is attending? I think it's the stakeholders, right? So identified stakeholders that both Accenture and the client side have agreed on to keep them engaged throughout the whole process. So it's not at the end a deliverable show up, but they've been with us creating those deliverables hopefully on a weekly or biweekly basis, depending on how sprints are defined. And then at the end, lately I've been loving the approach of closing out with a readout, but also a demo. So if there's something digital or physical that we can show them, a prototype to help build confidence on what we have delivered, because I'm more on the strategy side. So it's usually paper deliverables, accompanying that with something that builds the credibility. So some sort of digital demo or something, or a video that showcases what we've done over the course of the project,

Speaker 1: This is perfect. And so if you believe that there's potential for a follow up project, how do you communicate that with your client?

Speaker 2: Very good question. So I've been learning that a lot now. And I think what clients are very receptive on is the term of a backlog. So as I am working on delivering what we signed up to do, I keep a backlog of things that should be happening after that. It could be a very technical backlog where I have features on how we can enhance the product that we're

building, or it could be a backlog of activities maybe based on some assumptions that we made or some discovery that we made during the first phase of the project. We uncover scope that wasn't considered. I keep a backlog of that. And I actually include it as part of our readouts. So these were our findings, these are our deliverables and we typically face it as future opportunities. I've also done it in a way where I show them in a roadmap so that it feels to the client that were just thinking of it and how they can continue to improve the work that they started with us or without us. And being good advocates of their work by showing on how in the future they should continue to iterate on what we have delivered.

Speaker 1: Got it. And then when you think of your client relationships outside of engagements, how do you foster them?

Speaker 2: Client relationships? I don't think I have had the opportunity to do that outside of engagements yet because of my level, I think. Actually, so working out of the Houston innovation hub, we do tend to start seeing the same clients or accounts coming in and out and something that we had recently implemented. I'm not the one who executes it, but we have a person that manages those relationships for us is sending just regular communications of maybe new services that we have or availability that we have to visit our space. If we have new demos or new assets, we highlight them on our frequent flyers in the hub to give them interested and just remind them that there's an opportunity to continue to work with us, but I've never done that on a personal level. Hopefully soon.

Speaker 1: Perfect. And then do you think there are other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: I don't think so.

Speaker 1: Then, so usually I would ask you about your opinion on person versus remote work, but considering that you work in innovation hub, I'm going to ask you another question first and then jump back into it because I think it may feed into it. So in your opinion, how should we use our buildings, the innovation hub and offices, going forward to really use them to their full potential?

Speaker 2: Yeah. Good question. I think of the hub, even though it is an Accenture location, I do think of it as a little bit of a mutual space. And getting our clients out of our comfort zone. I do believe that the hub, I think especially now, that it's not necessarily being used as a day to day office but should be used to enhance the credibility our clients have on how innovative Accenture can be. I think we should go back to how we originally thought of the hubs. We were working on new relationship or we're going through orals or SOWs. Let's bring the client in, oftentimes those visits lead to conversations about things that they have not yet considered, because of the different demos that we have in this space. At least in Houston, we're going to have an energy transition installation. We have the 5G installation in Seattle. They're going to have a hygiene installation as well. So there's this bigger pieces of work that the client may not even be considering, but seeing it, I think, builds credibility. So I think it could be an office for some group of people, but it's more of this neutral space. So I think get inspired and quote, unquote, sell the client on new ideas or new considerations, for the future.

Speaker 1: Got it. Do you think that it could even help our Accenture internal company culture or is there anything we need to do to help our culture?

Speaker 2: That's a very good point. And I didn't touch on that. I think of it as this mutual space. So I think even accounts or even different community of practices within Accenture should benefit from that mutual ground where you don't feel you're in a corporate office, you're

getting inspired. I believe, I don't think this is something that we do today. In the hubs we should develop the thought leadership; are we bringing in our top leaders to and share with them our most recent thought leadership? We're doing a lot of discovery on new technologies, a lot of discovery on new client challenges. How are we sharing those out? Should we periodically be inviting our own people over, grow them in innovation, make them feel that we're at the forefront of the technology. And I think yes, that ultimately helps our culture, even our recruiting and how our people feel about difference that we're making as an organization.

Speaker 1: This is perfect. So then I am going to jump back. When you think of in person work first, is there any specific way you like to structure them? I think demos is a big one, right?

Speaker 2: Demos is a big one for sure. But I remember, and this unfortunately doesn't always happen because it requires some budget to be allocated to it. So it really depends on the account and how much they value that experience. But we do have a team that is called experience team and they literally can tailor the visit to help sell an idea, to help inspire, to help whatever it is that the accounts objective is. Yes, we do the typical demos. If the topic is on connected worker, we'll show you connected worker demos. Now our experience team has done things beyond that. Let's say this, the we're just building our relationship with this client. We're trying to build credibility on how we can be innovative. We've used the VR experience as part of it. And we have a bunch of Oculus Quests now in the hub. And we have one for each person that attends. And even though the workshop or the visit is not about VR, we will show you that we've used it in the Houston hub. We have this tunnel, it's the immersion tunnel, and it projects the video all through the tunnel. We've done custom videos or custom displays for our clients as they're doing the walk throughout the hub. The displaying in that tunnel is something that relates to them.

So we have some storyline, we're talking about some challenge that they have or something. So it's tailoring the whole experience as they're walking through our floor, helping them build relationships in an environment that may feel a little bit more uncomfortable to them than their typical corporate offices. I do think that it should be from the moment they get through the door and not just the demos that they feel. It's not just a typical working day, but you're there to get inspired.

Speaker 1: Got it. Do you think there are tools, activities or methodologies that are fruitful? So we have tailoring the message with videos or just making it more realistic and letting them feel it. But is there anything, I know you mentioned stickies in the beginning, anything else that really stands out to you?

Speaker 2: Methodologies that we use? Definitely the stickies and the brainstorming. Yeah, I don't think I can think of anything else.

Speaker 1: Okay. So then we're going to shift to remote work. I know you mentioned that when you meet someone, you have the camera on, otherwise we currently only have voice only. So it sounds like you're flexible there, but are there any other tools, activities or methodologies that you really like to use in remote engagements?

Speaker 2: I screen share a lot. I don't know why, but whenever I am screen sharing, I typically really do use PowerPoint and I don't put it in presentation mode. I don't know if this maybe the right answer, but I like to keep it on edit mode to feel like we're collaborating on it. So I'm often making changes as we are talking. So I think that engages people because if they're looking at this slide or they're looking at making the changes or making the notes, maybe it's not changes to the side, but it's notes on the side and comments that were made about it. So it's live note taking, I've used tools in the past like Mural. Microsoft whiteboard always a simpler version of Mural. So the same concept, right? So that I'm

taking notes, you're forced to look at what I'm seeing, even dictate some other notes that you want to be taken as opposed to be taking them offline. I don't think people will really know that you are doing that and may not be as engaged.

Speaker 1: That makes sense. And then do you think there are people that benefit more from either in person or remote work or is it more about really meeting the meeting agenda and then figuring out the format?

Speaker 2: I think hybrids are needed. I think there's a meeting objective that will require something in person, there's meeting objectives that will not require to be in person. And maybe even it's better to be virtual. But I also think that, if we are very transparent about the objectives and the agenda of the meeting, either one should work. I do have my preferences, but I don't think my work was completely interrupted by the fact that we had to be completely virtual for some time there. So I do think that we could be flexible and it was proven during the pandemic.

Speaker 1: Perfect. Then I have three final questions. So what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: I think it's to keep the meetings frequent. I'm a doer. So I, I didn't realize I needed to be in so many constant meetings because I will take the action that we discuss and I will make it happen, but not everyone is that way. Some people actually do work through meetings. That's how they can treat. They would not take an action to work on it after. So I've recently implemented more frequent, but shorter meetings. Even if it's just 15 minutes, and it has proven to be very successful, especially in a virtual environment with clients. So I have frequent meetings, shorter ones so that the attention span is not impacted and I feel a lot more gets done that way.

Speaker 1: Perfect. And then what makes a client engagement a success in your opinion?

Speaker 2: I think that it goes back to transparency. I think it's really, really hard to set the scope and expectations at the beginning. And for those to still be 100% true six months after. A lot is discovered, a lot is known that wasn't known, assumptions are clarified, and the deliverable can look very different as to what was stated on the scope or the statement of work, that would not be a problem if you're providing transparency throughout. So agile is a term, right? It doesn't have to be that structure but keeping very constant meetings and transparency throughout the engagement. We'll make sure that at the end whatever it is that we're delivering, everyone is on board with that. Whether it looks exactly as we originally defined it or not.

Speaker 1: Perfect. And do you have any last thoughts or pieces of advice on the entire topic on workplace settings or anything like that?

Speaker 2: I think maybe just one thing, for leadership or people in management positions always being one transparent, but to also understanding of everyone's individual situations. I think the fact that we had to go completely remote and then it was a hybrid and we're in this limbo now, I truly appreciate that. No one is expecting me to be fully in person or expecting me to have very set old school hours. I can work with leadership to let them know, Hey, because of the nature of today's world, I need to pick up my kid from school, there's a COVID case or something. And so today I'll be out, but I'll make it up later tonight or something like that. So keeping that transparency, I think has been very refreshing, a very refreshing and good thing that has come out of us having to learn to be remote and flexible.

Speaker 1: This is perfect. Thank you.

## **Appendix B15: Manager 5**

Date: Sarah A.

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes, I'm fine with that.

Speaker 1: And then the transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yeah.

Speaker 1: Perfect, then we're first going to just talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: In consulting approximately seven years now.

Speaker 1: Perfect. And then how many of those years have you worked in person and how many remote?

Speaker 2: I would say like it's been continuously all in person in the beginning and probably like the last two years due to COVID it has been more accepted to be more remote. I would say last two years only.

Speaker 1: Okay. And then have you detected any changes in yourself on your habits that you've developed in working from home?

Speaker 2: I think gradually with time, a lot of things started to change. Like in the beginning, it was quite a shock for everyone. You know, trying to adapt being in a certain place, like 24 hours in a year day with work, obviously your personal life, everything's happening at home. There has to be some sort of balance, which I try to adapt and practice and figure out when do I need the break. When can I stay away from my computer? Because when I'm in person it's a bit different, you're engaging with different people, you can talk, you can go for lunch breaks, et cetera. However, with remote, it becomes a bit difficult

managing your time and you end up working 24 hours as opposed to setting that break limit where you can interact with different people.

Speaker 1: That makes a lot of sense. And then, do you also have a preferred way of actually engaging with your coworkers? Would that be in person still or remote, a hybrid, anything like that?

Speaker 2: Now, I believe the best mix having a running project or something would be hybrid because there are a lot of things that could be done remotely. However, there are still certain cases where we need to be in person in case you want to build trust with a client, for example, or you want to build some team dynamics. It's very important to have a balance where you can work remotely, but also it's important to also connect with the team and be there in person.

Speaker 1: That makes sense. And then is that the same way you feel about engaging with clients?

Speaker 2: Yeah, absolutely. I can talk about my own experience. I've been working with a client for the past couple of months I would say, but I believe now is the time I need to visit. I need to be there in person to just build some sort of rapport with them. It's a nice balance that we're creating with the client and they've become more receptive to it that we don't need to physically be there in person all the time because work still continues even if you're not there and you can still work remotely. I guess it becomes more of you start prioritizing, why do we need to visit? And what's the purpose of this visit? Your planning becomes better in a nutshell.

Speaker 1: That's great. Then in this next phase, I'm going to actually walk you through seven different scenarios that we encounter with our clients. And it's really just about how you would ideally respond to the situation. In the first one, you're meeting a potential client and would like to explore if there's an opportunity for a new project, who are you meeting with and how would you like to engage with them?

Speaker 2: Ideally, because it's the first connection and first type of introduction, I would always like to meet in person. Ideally if that is a potential and then as we continue throughout our engagement or talking, we can switch to remote, but we'll obviously mix our interaction engagement. Sometimes we meet in person, sometimes we'll probably just have a phone call if it's easier and faster. A bit of both, I would say.

Speaker 1: Okay. And then you are actually working on a proposal now for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: Okay. I'm have a client, I'm working on a utility government company, we're working on a proposal. I'm just going to give an example of my current experience. How would I go about the proposal?

Speaker 1: Yeah. What do you do to successfully close it? I mean, usually we have a PowerPoint for example, but are you meeting again with them. Do you have email follow-ups? Is there anything that you can do to foster the relationship in order to close the deal?

Speaker 2: I mean, we have multiple workshops in between. We try to understand the requirements. Maybe we get on a call or we have a session with the different stakeholders and the people involved. I usually like to have all the people involved or touching the project at a certain point in time in one room or in one call where we can hear their thoughts, hear about their vision, what are their requirements, what do they anticipate, what happen? And that's what that gives us an opportunity for each person to talk about their dependencies, their issues that we might encounter. And it just becomes a very friendly, open conversation. You know, it just makes it easier when we're drafting a proposal because everyone's on the same page.

Speaker 1: This is awesome. And then now you win this project and you're kicking it off, who's attending the kickoff and how do you structure the meeting?

Speaker 2: I would bring all the people involved, all the main stakeholders, especially the people who are going to be the sponsors or the approvals of what we're delivering. They definitely need to be in the meeting. Me personally, as a manager, I would like to have everyone who's working on that project involved in the kickoff, even if they're not speaking. But I think it's important to listen to one another, especially if the VP is giving a speech talking about his ambition or just giving some friendly words to kick-off the project. It becomes a bit more inspirational for the rest of the team and people are encouraged and excited to kick-off the project. I would encourage everyone involved in that project to be part of the kickoff, even if they're not speaking or presenting anything.

Speaker 1: Great. And then during an active project, how do you engage with your client? Is it daily calls? Is it meetings whenever you need it? How do you structure it?

Speaker 2: Ideally, we have an internal checkpoint every day just to check on the status of where we are, see if there's any blockers, any issues, but we also have status calls with the clients as well. They understand what's happening with the project. And if we have any issues that would be the time to raise any red flags, any blockers, anything that's stopping us from like moving from one step to the other. I usually like to keep it consistent, on a daily basis, and then obviously when we have reviews or anything that needs some sort of approval, that's when we have a proper review session where all the people involved can be part of that call and give their feedback.

Speaker 1: Perfect. That leads really nicely into the next scenario. When you think of important milestone or the end of a project, how do you present your findings and who's attending the meeting?

Speaker 2: The first question who's attending the meeting, we usually have a product owner or a project manager who's owning that certain project or owning that certain the stream.

Those people will definitely be involved and they will basically have the key to approving what we're sharing and showcasing. They will definitely be involved. We also have all the different parties involved. Again, the team who are giving input and feedback into what we're creating or delivering, they definitely need to be there to see the final output. And usually when we are trying to achieve a certain milestone, we do some sort of demo or presentation or a proper showcase, and then showcasing basically the journey that let us stay. And I'm going to give the context of design. For example, we start with the journey, we start with the wire frames after that. And then we walk through the fine input, which is the visual designs in our case.

Speaker 1: Awesome. And then if you think that there is potential for a follow up project after you complete your current one, how do you communicate that with your client?

Speaker 2: Again, part of our process is we continuously have collaborations workshops, ideation sessions. It's a continuous process across let's say different sprints or different projects. Usually these ideas that come up, they're not really left hanging, we usually have a backlog of different ideas. And obviously if the engagement and process is going really well, the client is very happy. Our journey doesn't end there. Typically, when we complete a certain phase per project the client sometimes will be like, Hey, let's start working on this. And even if it doesn't come from the client, we also try to project and present back to the client like we had this idea before, this was in our backlog. How about we explore this further together and continue with the process. It just begins with a natural conversation that involves typically to a potential project.

Speaker 1: Okay. And then the final one outside of these engagements, how do you foster existing client relationships?

Speaker 2: The easiest way I would say is LinkedIn. We have all these social networks that make it very easy to connect with clients. I also have a lot of clients I've interacted with, I built the relationships, I also have their phone numbers. They do know at any point in time, if they have any questions or even then, some of my clients even still reach out just for validations. I think it's important not to burn any bridges and have these connections with the client because you never know, you could step up and create a new opportunity from scratch at any point in time. And also, obviously through your work, that's also another way. Once you're starting a project, let's say in a certain phase, there's also going to be a next phase and another phase after that. It's always important to make sure everything is going on track and there is a possibility for extension down the line.

Speaker 1: Perfect. Do you think there are any other relevant situations that we encounter with clients that I have not touched on?

Speaker 2: Issues, I guess certain scenarios could be when we can't account for things that could possibly happen without our knowledge or just things that could happen randomly, or something went wrong in development or something like that. In every project things can go south. And sometimes things happen beyond our control. I believe in certain cases we might not be equipped with the answers. Sometimes there's always a certain element of discovery where both parties, from the client side and from our side, we need to figure out a middle ground or how we want to approach the situation perhaps. Yeah. That's one case, I believe. But other than that, no, I think we covered everything.

Speaker 1: Perfect. Thank you so much. Then we're going to shift focus again and talk about just your opinion on in person versus remote work. How do you like to structure in person engagements? Is it weekly travels Monday through Thursday, is it dinners and special activities? How do you get together with your client?

Speaker 2: Usually when I'm with working with clients, I'm usually on site in their environment. I'm usually surrounded by them. I can just go to them, speak to them, have ad hoc very natural type of conversations. And they know if they have any questions or anything, they can just come to me if they need me. Also beyond that, we usually like to schedule lunch gatherings with the team and also with the clients it's also important to do that, that sort of relationship. Sometimes, whenever we want to celebrate a certain milestone, for example, we sometimes go out for dinner as a full team just to celebrate our accomplishment and looking forward to the next steps as well.

Speaker 1: Great. And do you believe that there are people that actually benefit from in personal engagements?

Speaker 2: I do. I do because people have different personalities. There are people who are more introvert and other people who are extrovert. There's a lot of people who are completely fine with being remote and they're happy and they love it, but there's other people who are missing the element of interaction, speaking to people, just walking up and like, Hey, can I speak to you? Can we discuss this? And you know, there's a lot of different personalities. I do believe that that there's a difference.

Speaker 1: Okay. And then other tools, activities, or methodologies that you like to use in in person engagements?

Speaker 2: For example, the workshops for me is a big hit if it's in person compared to remote. I'm not a big fan of remote workshops. I just don't feel it captures the energy, the engagement and the aspect of literally brainstorming and getting everyone involved. That's my personal preference. There's certain things I would prefer doing in person as opposed to remote. However, when you're working on a certain task or a certain report, I do believe in certain cases those could be done in solo, you don't need to have a certain interaction

point. It really depends on the type of output that we want to achieve. If you want to brainstorm, this is something I would encourage doing in person. If you're working on something else you need to focus, then that's when I would recommend us working remotely.

Speaker 1: Okay. Then I'm going to ask you the exact same questions about remote work. How do you like to structure remote engagements? Is it voice only, camera on, screen sharing, interactive?

Speaker 2: I try to keep it as interactive as possible. I'm not a person who's going to force people to turn on their cameras. I feel like it's their preference, you know? Ideally, I would like everyone to have a say if it's remote. Something different I actually do remotely is if I'm on a call with a big group of people, and no one's talking, I would literally call them out on the call like, Hey, what do you think? And I specifically label them and call them out, which is very different than in person. Whenever you're giving a talk or something, automatically you'll have that energy and that engagement in person, but with remote, it's very difficult. Sometimes you just need to put in a bit more effort in terms of trying to encourage them to speak up, to not be shy, let them know that you think there's no wrong answer and so on.

Speaker 1: Yes, this is perfect. Thank you. And then what people do you think benefit especially from remote work or do you think there are any?

Speaker 2: I believe you can, there's certain people that can focus really well remotely. And I've seen a lot of people who, skyrocketed, I would say, during the pandemic just because they were finishing a lot of their work on time and even faster. Just because they're working by themselves and they're working at home and remotely, because they're not really distracted by the little talks, the little coffee breaks. You kind of run out of time when

you're at work time, just flies by, but when you're at home, you're just focused and there's no interruptions, you manage your time as well. You can set let's say your team's channel to away. You can just focus on that. And no one can say anything about that.

Speaker 1: Great. And then are there tools, activities, or methodologies that you like to use in remote engagement?

Speaker 2: I like using Mural, for example, or Murals as tools for brainstorming, if needed or you see the Zooms, the Google needs, the Teams channels are very critical. WebEx sometimes for connections with the certain clients. I believe those are the main ones for tools.

Speaker 1: Great. Then we have one more section. Next we're going to talk about the future of work. How do you foresee your projects to be structured going forward?

Speaker 2: I believe it would be a hybrid model moving forward for sure, because it's a method that works. I mean, we've seen the benefits of people working remotely, but we also know the benefits of being in person. I believe the future model would be a combination of both where when you need to be there in person, you will be there. And when you don't need to be there in person, you just focus and work remotely with your team.

Speaker 1: Okay. And then personal, what would be your ideal structure? Is it 60% / 40%, 80% / 20%, anything like that?

Speaker 2: I think 60% / 40% would be the best the best mix. No, I guess I'm going to change my answer. For me it would be a combination of both, but 50% / 50%. That for me is more ideal. But also it's very scenario and case based. Again, it depends on the situation, if there's a crisis or what not, if there's something I need to be in person to build some sort of relationship, then maybe it's longer going to be 50% / 50% in the beginning, but maybe it will be like 60% / 40% to start with. And then we will transition and move back to the 50% / 50% splits.

Speaker 1: Got it. And then how should we continue to strengthen our company culture? Do you think that's in person events like office days and Christmas parties, is it gift giving, do you have any ideas?

Speaker 2: I guess it's a combination of different things. Part of what makes us part of a culture, the most important component, is the people we interact with. The people and our loyalty to the organization and how we work together and build trust and all of that. How we celebrate diversity, how we celebrate our strengths, how we celebrate one another and also, during times of need and giving and holidays, that's when we try to bring the team together. Let's say on New Year's, during Christmas and also different holidays as well.

Speaker 1: Okay. And then I have three final questions. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: One advice, let me think. I think the most important advice is to listen. Because sometimes, like a lot of things could be lost in translation that could be missed out from either the client or from the manager aspect. It's very important to listen, to take in that feedback, whatever it is that the client is saying, and really try to rationalize how to approach certain things. Because you're never going to have an answer automatically when a client says, Hey, we have this issue or, Hey, let's do this. You know, we shouldn't just think on the spot. We really need to be careful because when you're making decision, you're not making a decision for yourself. You're making a decision for your entire team and for the entire project in nutshell.

Speaker 1: Perfect. And then what makes a client engagement a success in your opinion? Is that the same? You just have to listen.

Speaker 2: The client, it's a bit different because the client needs to trust us. And that's a very big component, without trust you will not have a successful project and they need to be able

to trust your skillset, your expertise, your knowledge. There's a lot of factors that could be derived from just building trust. And sometimes building trust could be as simple as just listening. Or it could be just trying to rationalize your ideas, trying to make sense out of being there in person, just to communicate to showcase different aspects. Sometimes you just need to also do a presentation just to build that sort of trust where the client can be like, I know exactly what you're doing, I love it, I can trust you. And that just continues the relationship building beyond work.

Speaker 1: Perfect. And then, do you have any last pieces of advice or thoughts that you would like to share on the topic?

Speaker 2: No, I think you captured everything. I'm just wondering, it would be interesting to see how we transition post this pandemic. What would be, I would say the ideal formula moving forward and not just understand the managers and the people who are working on the job, but really trying to understand as well the mentality of clients. Is this a model that they still prefer or is this a model that they just completely are against? And they want to be able to see clients and want to be able to see people in person. I think that would be interesting to compare, maybe have interviews on that aspect and try to understand the rationale from clients as well.

Speaker 1: Thank you very much.

### **Appendix B16: Senior Manager 1**

Date: Sarah johnson

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 3: Yes.

Speaker 1: Perfect. We're just going to talk about your experience in the first section. How long have you worked in consulting?

Speaker 2: In consulting? just for this company or in general?

Speaker 1: In general.

Speaker 2: About 10 years.

Speaker 1: Okay. And how many years have you worked in person and how many remote?

Speaker 2: So I've been and remote technically for over 10 years. I always just travels to the client's office.

Speaker 1: Okay. And have you detected any changes in yourself on your habit that you've developed since primarily working remote?

Speaker 2: Definitely.

Speaker 1: Do you have an example?

Speaker 2: Yeah. For one, there's a lot more flexibility with working remote like this. So, it allows me to get personal stuff done throughout the day, but also able to meet my client schedules much better. So for example, I'm able to do something for myself, like go for a run in the middle of the day and then a client call like 6:00 PM or something like that. So it provides quite a bit more flexibility to create a bit more of a balanced life. Although there are challenges to that as well.

Speaker 1: That makes sense. And then how do you prefer to engage with coworkers and we'll get into the challenges in a little bit?

Speaker 2: How do I prefer to engage with coworkers? Are you asking like in a form of a technology, like via email or face to face or something? If there's a preference?

Speaker 1: It's more, is it face to face? Is it a Teams call? Is it a hybrid?

Speaker 2: A hybrid for sure.

Speaker 1: And is that also how you prefer to engage with clients?

Speaker 2: Exactly. Because especially since the pandemic started, it just seems like there are really unnecessary meetings taking place. Where a question could easily be asked via an email and a couple of emails back and forth than taking up somebody's like 30 minutes on their schedule.

Speaker 1: That makes a lot of sense. Then we're going to shift focus. I have an extra section on benefits and drawbacks of remote and in person work. So we can get into more details then too. But in the next section, I'm first going to ask you about different scenarios that we encounter with our clients and how you would ideally respond to them. It's seven distinct, different settings and then I'll give you the chance if there's any I didn't touch on to add to that. But in the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project, who's your client: So what level of seniority are they and how do you engage with them? Is it an email, is it a dinner? Is it a lunch? How do you meet with a new potential client?

Speaker 2: Yeah. So for me, in my experience of meeting a new client and kind of gauging interest and understanding where there's opportunity typically just starts off with a first face to face meeting. That's how I prefer to do that. And it would be great if it's something a bit more casual in terms of like over a coffee or a lunch rather than directly in someone's office or in a meeting room.

Speaker 1: Perfect. And then you are now working on a proposal for this client. Who's your target audience and what do you do to successfully close to deal?

Speaker 2: Great question. So target audience, are you asking like level of person?

Speaker 1: Yeah, correct. Like level, and then I think also some people have very distinct opinions on a large versus a small group to target the proposal to.

Speaker 2: Yeah. So, where I feel like we've had the most success engaging with clients and actually finding something to be working on together. The person is typically a senior director or a VP level within the company. I feel that sometimes if you go too high, they're not as engaged in the details of something that you could potentially help them on. So they may not see the value. However, if you go a little bit lower and people get involved in more of the details of a project and understand the nuances and the value that you're bringing to them, I feel like it's a bit easier of a sell and so therefore I prefer to go to like senior director or VP level people. And then in terms of the number of people involved, I mean, I've actually really never kept track of the number of people. It's, not a lot, if I had to put a number around it, I would say less than five initially.

Speaker 1: And then you were talking about the details you're aiming at to really be successful in the bid is figuring out their core issues and addressing those. Does that sound correct?

Speaker 2: Yes. Figuring out the core issues, addressing those, but I think what I've also found to be very important is to make sure that you're pitching what the differentiator is for them to be working with you. So sometimes that's identifying what the person's individual goals are internally. So like what kind of metrics are they measured on and seeing if you can align what you're delivering to them based on what their individual metrics are so that it helps elevate them internally within their own company.

Speaker 1: Got it. Perfect. And then now if you think of the kickoff of a new project, who's attending that kickoff and how do you structure the meeting? Is it in person, remote?

Speaker 2: I think the kickoff meeting, I prefer them to definitely having some structure, but also a little casual because I think who needs to be there are the people who are delivering a

project. So for example, it would be the team from Accenture that would be coming in for the kickoff meeting. And also the people from the client side, all of the people who would be involved in the project because in these things, I feel like the best recipe for success is having a good relationship with each other. And if you don't get to know each other on a slightly personal level, it's very hard to understand people and understand how they work and what's important to them. In a perfect world, it would be in person, maybe even around a lunch, again something that's a little bit casual, so people can have some time. Unfortunately, some people hate small talk, but I find it actually to be a bit useful just to get to know people. And then there is the structure in the sense of everyone introduces themselves, what their roles are throughout the term of the engagement and also understand what the end goal is here that we're all aiming for.

Speaker 1: Perfect. And then if you think of an active project, how do you engage with your client then?

Speaker 2: Well, again without COVID restrictions it would be in person. I definitely feel that the in person stuff is pretty helpful. But I mean, I understand too that it doesn't always need to be in person. I feel like some people feel that we waste their time with in person work and it could just be done remotely and they can move on to other things and not give all of their focus to us. Going back to your question, I would definitely say a hybrid of things, I feel like, is the best way to accomplish this.

Speaker 1: Okay. And I think the next scenario may add to that. So if you think of important milestones or the end of engagement, do you think it changes things or how do you prefer to present your findings?

Speaker 2: In terms of the end of the engagement of how you present the findings? I mean, I think it totally depends on the kind of project and even the relationship that you have with the

client. I think what would be a little bit more thought put into answering this question would almost be like, is there a project you're trying to get after that with the client? So would it be helpful to present it in person because there can be more dialogue with each other face to face about talking about what's next for both of you to work together on. If it's the end of an engagement again, depending on what level the project is and what you're trying to do with the client, perhaps if it's something easy and simple, you can just do it remotely over a video. There's is so much nuance to that.

Speaker 1: This is perfect. You actually addressed my next question too on how to address follow up projects. So that's perfect. And then the last one is outside of engagements, how do you foster existing client relationships?

Speaker 2: Great question. So I haven't done that here at Accenture, but in previous companies, fostering existing relationships outside of the current engagement is so important because especially I have found in this industry of the energy world, it's, you could say, relatively small. A lot of these people know each other, especially on the utility side, they'll talk to their counterparts at other companies, so it is very important to stay in the loop with everybody. In the regular role outside of COVID you would see these people on a somewhat frequent basis at conferences. So there would be touch points probably once a quarter. You would see them face to face at some sort of networking event or a dinner or something like that. So, definitely have to stay engaged and up to date with other clients, potential clients.

Speaker 1: I haven't heard this before. So most of these network events are industry specific. They are not necessarily one on ones. Does that sound right?

Speaker 2: Yes. That's right. There are a number of industry events that take place all over the country and you see the same people very regularly at these events. Before I've come to

Accenture, I would see a lot of these people three or four times a year at conferences and stay up to date with them there if I didn't have a current engagement going on. But since coming to Accenture, I don't think that they're too big on the conference circuit from what I've seen.

Speaker 1: Right. Which may be why I haven't had anyone else name conferences before. So that's interesting. Do you think there are other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: I can't think of any.

Speaker 1: Okay. Then we're going to change focus and talk about your opinion on in person versus remote work. So the first section is just about in person work. Could you describe how you like to structure in person engagements? Would it be every week, Monday through Thursday, is it weekly travels? Do you do dinners or any special activities?

Speaker 2: Is this just for the Accenture team or is this with the client too?

Speaker 1: Whichever one you feel more comfortable answering or if you want to highlight the differences, that'd be great.

Speaker 2: Yeah. So I feel like traveling Monday through Thursday, especially on the energy and utility side of things, I do not think it's necessary to be traveling Monday through Thursday. I feel like a lot of the work that we do can be done remotely. I think the challenge that happens with that is it's two things. I think the greatest challenge with not traveling Monday through Thursday to the client site and seeing the team, the Accenture team, face to face is one. I think it does not create a very strong collaborative effort for the team. And that's both on the relationship side, like getting to know each other each other's skills and just fostering relationships. I think that makes it very difficult. And two on working together, I think is very tough doing remote work like this, especially when you're trying to come up

with creative solutions for customers or clients because you don't have those little side conversations with one another that you would have seeing each other face to face or having a lunch together or something like that. So I think that the remote work and not traveling to the site does the team a disservice in the sense that there isn't much opportunity to collaborate outside of scheduled meetings that happen on Teams and I think that harms the solutions and creativity that we can bring to clients.

Speaker 1: That makes sense. So do you think that there are people that especially benefit from in person work, if so who would that be?

Speaker 2: Certain people that would benefit from in person work... I think that there probably are some people that benefit from that, especially those who are much more outgoing and feed off of people in terms of their creativity and motivation. Like there are some people who do much better being around a lot of people but then there are also people who are just so introverted that it's exhausting to be around that many people and work around that many people so many times. I think, from what I've seen on the Accenture side, in some of the projects that I've done, the consultants and analysts would be traveling in, they're really young and some of these projects are not in big cities. So if you're going to take a 22 year old or a 23 year old and fly them out to some suburb Monday through Thursday where everything closes at 7:00 PM and they're just leaving the office, that's super depressing. They have nothing to do.

Speaker 1: I never thought of that, but that makes sense. So when you are together in person are there tools, activities, or methodologies that you like to use?

Speaker 2: Tools, I would say, would be no different than working remotely. I think it's the same tools. In terms of programs and how you share your work with one another, I really honestly think it's the same stuff you would use if you were remote. Methodologies, I

think it's just a matter of sitting with the ideas. I guess now that I'm thinking of it, I don't think that there are any different methodologies either because when you're in person doing some of this work, you just take your computers and go sit in a conference room and share screens just like you would right now. Right. So no.

Speaker 1: Okay. Well then I'm going to ask you the exact same questions about remote work. How do you like to structure remote engagements? Is it voice only, camera on, screen sharing, interactive?

Speaker 2: Screen sharing is very helpful because I think some people are much better at describing what's going on with the project and what the delivery is without showing it. Whereas some people need the assistance of being able to show something for other people to be able to better understand what it exactly is they're talking about. So screen sharing, I think is very beneficial, in terms of turning your video camera on, I actually do think that sharing your video can be helpful. Especially in the beginning for Teams to just see each other a few times. I think that's helpful in the beginning of the engagement in terms of the long run of it. I don't think you need to have your camera on for every meeting. I don't really find that necessary, but I do think that body language is very important to see and at least facial expression you can gather on the video for clients. I actually do think having your camera on during client meetings is much, much more helpful than not, again it's because you can read facial expression and be able to better understand what their understanding is of certain things or pivot if you need to. That's obviously pretty difficult to do when that's not turned on.

Speaker 1: That makes sense. Do you think that there are people that benefit from remote work, sounded like maybe introverts based on your previous answer?

Speaker 2: Yeah. I absolutely think people benefit from remote work.

Speaker 1: Okay. And the same tools, activities and methodologies question, it sounds like it's the same that we are using. So it's screen sharing, PowerPoint the basics?

Speaker 2: Yes. I don't think I would change anything there.

Speaker 1: Okay. And I have one more distinct phase. We're now talking about the future of work. How do you foresee your projects to be structured going forward?

Speaker 2: In turn of like being remote or in person?

Speaker 1: Correct.

Speaker 2: I think it's a hybrid of the two and I think actually, I feel like we will have much more success with the hybrid leaning heavier on remote work than the in person work. Just because I do think that in my experience, at least for myself, I can't speak for everybody, but I am much more effective working remotely and without having the commute to places or the extra time that it takes to do a job in an office or the interruptions. So I think I'm more efficient working from home. I do still think that having that client interaction face to face is important. So that's where the hybrid comes in and same thing for team meetings of internal Accenture teams. So I do think that it would be helpful for the team to meet face to face. Like I don't know whether it be once a month or quarterly or something at the client site but I don't think it's necessary to do that every week. And I also think that it's mentally and physically much better for our colleagues to have that hybrid of not having to travel to site every week.

Speaker 1: Right. So if you think about it even more personally, what would be your ideal structure would be 60 / 40, 80 / 20, anything like that? Or is it just demand driven?

Speaker 2: I think more than anything if you had to put a number around it, I would say like 75% remote 25% clients. Maybe once a month you go to the client, and then adjust as needed. But I think for ease of saying that I would say 75% remote, about 25% in person.

Speaker 1: Okay. And then I don't know how much of an opinion you have on it just considering that I don't think you've been in an Accenture office yet.

Speaker 2: I've been to the San Francisco innovation hub to work on an RFP with the team.

Speaker 1: Okay, so then how should we use our buildings, the innovation hubs and offices, do you have an opinion on that?

Speaker 2: I don't because I've only used it as a collaboration space for internal use but I've never used it for client needs. So I've never taken a client there to show them how something works or anything like that.

Speaker 1: Okay. Then the last question of the section is, how should we continue to strengthen our company culture? Do you want more office days or Christmas parties? Do you want more gifts? Do you have any other ideas?

Speaker 2: I could do without the gifts. That really doesn't mean anything to me. Office parties and things like that, I think that. It kind of goes back to, it is nice to see people face to face and develop those relationships internally. And it would be nice to see more of my colleagues face to face. I guess I've been in the workforce for like 16 or 17 years now and I do see the benefit of relationships and how they help you personally in terms of your career and it's incredibly difficult to do that over videos on the computer. So without being in an office full time, I do think that having these sort of network things just internally would be very beneficial, whether that be parties or just sanctioned days for networking.

Speaker 1: Great. I have three more questions. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Well, so I would say remain flexible because I think from what I've been hearing from people, it's hard to staff projects where you're asking people to come in full time. So I think remaining flexible, you'll get the best work product out of people. And I think you'll

create a more positive culture for the Accenture team. I think what would also be helpful would be just set up an understanding of expectations, in terms of whether they be daily team meetings or understanding how you want to see people's work. Do you want them to email it to you, want them to use Teams? So being flexible and also being explicit, I think are some of the most important things.

Speaker 1: And what makes a client engagement a success in your opinion?

Speaker 2: I think what makes the client engagement successful is one seeing progress on the project. So being able to move forward through each step of the delivery process and being able to pivot easily. So I mean, clients provide feedback all time after each meeting so making sure that we're able to internally pivot and take their feedback and adjust what we're doing as we move forward. So remaining strong with what the statement of work says, but also having slight flexibility as we come up with solutions and deliver that and receive the client feedback and adjust to the process how we can.

Speaker 1: Perfect. And then do you have any last pieces of advice or thoughts?

Speaker 2: In terms of remote work and in person, I think as companies move forward with this stuff, I think it would be very hard at this point to say that you require all of your employees to be in person 100% of the time. I don't think it is, at least in the near term, I don't think you'll get a lot of good talent if you're going to require people to come in 100% of the time, full time.

Speaker 1: I agree with you. Thank you.

## **Appendix B17: Senior Manager 2**

Date: Kate

Speaker 1: I'm conducting these interviews for my dba research. I would like to ask you a few questions about your experiences with vary workplace settings. The interview will last about 30 minutes, do you consent to be recorded?

Speaker 2: Sure.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yeah.

Speaker 1: In the first section we are just going to talk about your experiences in the workplace. So how long have you worked in consulting?

Speaker 2: 10 years.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: So probably eight years. And then the last, maybe two and a half years been remote.

Speaker 1: Have you detected any changes in yourself or new habits that you've developed since working from home?

Speaker 2: Yes. Well, I definitely don't get ready in the morning anymore, so definitely the morning routine and then also I used to travel a lot. So I would do most of the chores kind of on the weekend. And now I have a little bit more flexibility to do a lot of that at home. And then also from an exercise perspective, I find myself exercising more consistently as well.

Speaker 1: That's awesome. And then how do you prefer to engage with your coworkers? Would that be remote, in person, hybrid?

Speaker 2: Probably hybrid. I think it's good to have a mix where you get to see everyone and get to know everyone a little bit better, but then also I do like the flexibility of not having to, you know, travel Monday through Thursday every week.

Speaker 1: Perfect. And is that also how you feel about your clients, engaging with them in a hybrid approach would be best?

Speaker 2: I think so. I feel like for most of my consulting career, I did not need to see my clients every single day and so probably like once a month to just go over the progress and tie off on key deliverables is probably the perfect balance.

Speaker 1: Perfect. Then we're moving into the next phase and I'm going to walk you through seven different scenarios that we encounter with our clients. I would just like to hear how you would ideally respond to the situation. So, in the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project. How do you get together with this client, how do you engage with them? Would it be a dinner? Is it an email? How do you structure it?

Speaker 2: Yeah, typically I would probably go the email route. So if I didn't know the client, I'd try and find someone who did know the client and so that way I'd be able to get a warm introduction at least through email and then try and schedule time with that particular client to discuss the opportunity.

Speaker 1: And you're now working on a proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: Okay, I think you would have to assess essentially who controls the budget, who's the buyer, right? So you would figure out who's the buyer, but then also get a little bit of coaching from maybe stakeholders that are interested in the project being successful. and so that way you know, you're able to frame a story that would be appealing to, to the client and so that they see the benefit to them as well as kind of the rest of the organization.

Speaker 1: Great. And now you're kicking off this project since you won it, who's attending the kickoff. And how do you like to structure that meeting?

Speaker 2: So for the kickoff usually it's the project group, like the buyer, the direct client that you'll be working with day to day, just to run through the basics and set the ground rules about how they want you to engage with the rest of the organization. And then if there are a ton of stakeholders that you have to either interview or work with, then you would probably do a wider kick-off to let them know about the project and what it's about and what you need from them.

Speaker 1: And during an active project, how do you prefer to engage with your client? Is it in person, remote video? Anything that shows how you truly engage with them?

Speaker 2: So while remote I prefer to schedule like meetings but I have also had some clients who just like to call and just like ping you and have a conversation that way as well. So it's probably one of the two that I prefer.

Speaker 1: And do you prefer remote work, like random calls, or do you think you should also meet with them in person?

Speaker 2: I think it would be nice to be able to meet people in person. Especially if it's like a brand new project and you don't really have that relationship with the client just yet but on kind of longer term clients, right. If they're like calling you and you've got a pretty good relationship, I feel like you don't need that in person to connection as much.

Speaker 1: Got it. So if you then think about important milestones or the end of an engagement, how do you present your findings and who is attending the meeting?

Speaker 2: Yeah, so typically I've always just done it with the direct team then usually they'll either want to present the findings or we'll present with them to kind of the rest of the stakeholders that were part of that initial kickoff to just show what we've accomplished. And then even after the engagement wraps, I'll usually follow up with them after like a

month or two if the project doesn't expand just to see and check in on how useful that project was before, just a way to kind of catch up with them..

Speaker 1: Perfect, that leads very nicely into the next scenario. If you do believe that there's potential for a follow up project, how do you communicate that with your client?

Speaker 2: So usually, I'll tee it up in a conversation while we're discussing the deliverables. So I'll say, hey, it seems like you don't have this particular service or this particular asset that you probably need. Is there any interest in having us explore that a little bit further and see, and kind of gauge their reaction? Because sometimes they'll say, oh no we've got it. Or they might not even realize that it's something that's important for them to have. So that's usually how I would tee that up. And then if we as Accenture have a resource or someone, I'll bring that person in for backup and support as well.

Speaker 1: Perfect. And the final one, outside of engagements how do you foster existing client relationships?

Speaker 2: Yeah, so usually I'll check in with them. So for some of the clients that I'm really close with, I'll actually treat them as friends and communicate with them on social media.

Speaker 1: And then do you think there are relevant situations that you encounter with clients that I did not touch on?

Speaker 2: No. I mean, I think it's pretty thorough.

Speaker 1: Then we're going to shift focus and talk about your opinion on in person versus remote work. Could you describe how you like to structure in person engagements? Is it Monday through Thursday, sounded like it was a little outdated, but do you have dinners with your client, do you do special activities?

Speaker 2: So if you're there every single, like Monday through Thursday, I would say we usually just plan an activity maybe once a month and just take the client out because you're like

constantly there and there's plenty of facetime. I think if, you know, on the projects where I was traveling in, maybe like once a month or you wouldn't really see the clients as much essentially every time you were in town you would take the client out and catch up over a working dinner or something like that.

Speaker 1: Got it. And then do you believe that there are people that especially benefit from in person work and who would that be?

Speaker 2: I definitely think so. I can't imagine being an analyst or a consultant and then having to make a transition from school into the workforce completely remote. So I feel like that would've been really difficult for me. Just like thinking back and then there's definitely people who really thrive off of teamwork instead of independent work. So whether it's brainstorming sessions, that sort of thing, or if they're learning something or trying to figure something out. So I feel like that probably benefits a lot in person and being in a room together and being able to whiteboard something out, like no matter how good Zoom technology or all the collaboration tools we have are.

Speaker 1: Perfect. I think you also answered my next question. Are there any tools, activities or methodologies you like to use in personal engagements and it sounds like whiteboards, maybe?

Speaker 2: Yeah. I feel like that's pretty important where sometimes you just need that comradery. If you're trying to either frame the story or you're trying to figure out an approach, I've always kind of appreciated the fact where everyone's in a room and then you can time box it and say, okay, for example, for market research. Instead of just saying you do market research for two hours and then come back and we'll discuss our findings, I've always found it kind of fun and engaging where everyone's in a room together. And then you say, okay, for the next 15 minutes, we're going to time box it. Like, let's figure out

what we can find on the market size for this. And then everyone does their own research. Maybe they find different sources and then they come back to the table with their findings. I almost feel like you get a little bit more momentum and discussion around those than having to just complete a slide, a task and in a couple of hours later.

Speaker 1: Right. Then that sounds like it may almost be more efficient to get together?

Speaker 2: Yeah, because you're time boxing it. And you're just saying, you just have 15 minutes to do this. And so it forces people to really focus and everyone's in the room together. Then you move on. Because sometimes for a lot of the stuff that's open ended, there might not be an answer out there. No matter how long you try and google for it, that answer might not exist. So you're just saying if three or four people were all trying our best and can't find it, maybe it's not out there. We have to figure out a different approach. So I feel like that's the feedback's pretty immediate. And I think that's one of the things that I do miss about collaborating and just working with other people in person.

Speaker 1: Got it. So then I'm going to ask you the same questions about remote work. How do you like to structure your remote engagements? Is it voice only, camera and screen sharing, interactive?

Speaker 2: I think I'm actually pretty flexible. I don't have a preference. I generally go along with what everyone else prefers, because it's just one of those things where if I generally don't have a preference and other people have a preference then someone caring should always proceed over someone who doesn't care and doesn't have a preference.

Speaker 1: And do you believe that there are people that especially benefit from remote work?

Speaker 2: Yeah, I think so. I think people who might need a little bit more flexibility during the day. I can also see people if they're generally kind of an individual contributor. I think that

probably doesn't impact their work as much either. Because if they came into the office, they would probably be doing the exact same thing as well.

Speaker 1: That makes sense. So then do you have any tools, activities or methodologies that you like to use in remote engagement?

Speaker 2: So I do Slack a lot, but I feel like usually that's kind of client dependent. So I've had clients really, really like Slack and then also just the opposite. I also like Trello a lot. Especially if you're working with development teams and you've got a ton of tasks and you're just trying to make sure that you complete all of the tasks by the end of the week. That way you're not always like wondering what the different items are. So I feel like those two help manage the engagements where they're complicated, large teams and a lot of different things going on. But other than that, I mean, usually you can get everything needed from like a daily status call or a standup.

Speaker 1: Perfect. Then we're going to change focus one more time and talk about the future of work. How do you foresee our projects to be structured going forward?

Speaker 2: I think it's going to be really client dependent and so if the client is pretty chill and they're in an industry where they don't really feel like it's critical to go into work or be in person, I can see some of those engagements actually shifting more towards remote work. And then just kind of doing the key touch points where deliverables and things are being discussed are in person. So I think it's completely client dependent. There are some communications clients that were pretty notorious about everyone back into office even during the pandemic. And so I can see those clients being kind of the first ones that want everyone back in office for facetime and things like that.

Speaker 1: Right. So then what would be your personally ideal work structure?

Speaker 2: I would probably say hybrid. I think you lose a lot of time traveling to and from client site and it's also just really tiring. So if you don't need to make the trip, you're actually way more productive at home. Instead of getting up at 3:00 am, board a plane and then still struggling to function all Monday and losing a bunch of time on Thursday as well. So I think hybrid definitely makes the most sense and then just being able to still use a lot of the tools like Zoom or Teams to keep in touch with your clients and check in.

Speaker 1: Got it. And how should we use our buildings, the innovation hubs and offices, you earlier talked about more collaboration. So should we just focus on that?

Speaker 2: I think so. I think it is important to showcase to clients what is possible with the technologies to show, hey, we've already built it and this is what it looks like because I think for some of the more abstract concepts, it's really hard to just explain to a client and have them understand it versus this is what it looks like and this is actually what it means. So I feel like for a lot of those spaces it should serve as an educational function almost for a lot of the clients. And so that's kind of how I think of all of the innovation hubs and the spaces and things like that.

Speaker 1: Perfect. And a final question for the section. How should we continue to strengthen our company culture? Is it more office days and Christmas parties? Is it gift sending?

Speaker 2: I think it's probably a mix of it, kind of building relationships with people that you work with on projects, but then also maybe having a handful of in person office events. So I think we have first Fridays of every month and so maybe giving people the flexibility of joining an hour or two of the programming that they want or they're interested in doing and giving them the flexibility to do that. So giving them either a training code or some sort of WBS for first Fridays so that they would be able to go in person and then participate in some of those activities.

Speaker 1: Perfect. And here are my final three questions for you, what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Yeah, that's a good question. I think it's probably to check in with them more often than you probably would need to if you were managing an engagement in person. I remember when things were in person, I would probably only have one status update a week with the client. On like Thursday before we would all pack up and go home. It would be like, this is everything that we've accomplished this week, any concerns because a lot of the conversations would just happen organically where you would say this is what we're working on. Like directionally, are you okay with it? But being remote, like none of those things can happen. So it's probably that a lot of the engagements have gone from just like one formalized check in a week to maybe two or even three check-ins a week.

Speaker 1: That makes sense. And then what makes a client engagement a success in your opinion?

Speaker 2: I think my favorite client engagements are the ones where the client actually gets something out of it. I had a project where we helped a client launched a new line of business and after it launched all of the leadership got promoted. And I think that was a pretty good feeling because it was a big accomplishment for our internal team. And then it was clearly a really big accomplishment for a lot of the client team as well.

Speaker 1: Perfect. And the very final one. Do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: Not that I can think of.

Speaker 1: That's totally fine. Thank you so much.

### **Appendix B18: Senior Manager 3**

Date: Geoff

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experience with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Sure.

Speaker 1: The transcript will be made anonymous and attached to define the project. Is that okay?

Speaker 1: Yes.

Speaker 1: So first I'm just going to ask you about your experience in the workplace. How long have you worked in consulting?

Speaker 2: I have worked in consulting since 2004. So, 18 years.

Speaker 1: How many of those years have you worked in person? How many remote?

Speaker 2: I'd say all of those years, with the exception of the last couple, have been a mix of remote and on site.

Speaker 1: Okay. And then have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: I have, mostly to the detriment, but yes.

Speaker 1: Okay. Anything you want to share of just small things?

Speaker 2: No, I've found that, I guess it's to cause an effect situation, I am more likely to take on more work, which means I am less likely to be as prepared for all of that work and completing all the work as I probably should.

Speaker 1: That makes sense.

Speaker 2: All right. But I feel like I have more hours in the day, so I feel like I can do more and it turns that I can. It's not the best for mental health for sure.

Speaker 1: Right. What is your preferred way of engaging with coworkers? Would it be in person, remote, hybrid?

Speaker 2: A hybrid. I think it's a good balance, I don't think that's necessarily the best practice as much as I understand my personality that I can wear on people. So three days a week is perfect.

Speaker 1: What about clients? Would that be the same?

Speaker 2: Yeah, I think so because then it's about maximizing touch points, too. Like high value transactions versus constant transactions, right?

Speaker 1: Perfect. So then I'm going to walk you through seven different scenarios that we encounter with our clients. I would just like to hear how you would ideally respond to the situation. In the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project, who would you like to meet with and how would you engage them?

Speaker 2: I mean, obviously making this up and talking generally, the main people I would want to work with for a given opportunity would be people who are friendly. So would qualify three kind of actors. If it could be that way, if they're all in the same person all the better, but it's a classic sales situation of understanding who your friendlies are. If you can talk to frankly, get the truth from comfortably, people who have pulled the financial purse strings, and then the people who are kind of a user buyer, people who are actually going to use or be involved stakeholders in direct stakeholders for the work. So ideally it could be all three, somebody who's a friendly, you can talk frankly, who has control of the purse strings and understands the full scope and impact of the work that we can do.

Speaker 1: Would you meet with that person or email them? How do you have to the conversation?

Speaker 2: I would prefer for the initial conversation to set the stage per emails, but ideally it's an in person and or face to face conversation.

Speaker 1: Okay. And then now you're working on a proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: Target audience are the same folks that I just talked about and again, not to get into nuts and bolts, but it would be a matter of making sure we're providing messaging that's relevant to three of them. That's usually just to cut up the same information. Ideally particularly with the user buy and the financial buyer. I would say an in person meeting is always ideal.

Speaker 1: Perfect. And then now you're kicking off this new project that you just won? Who's attending the kickoff and how do you structure the meeting?

Speaker 2: So the structure would be built around the reiteration of the scope or an introduction of the scope based on who's going to be in the room to start. So what do we want to talk about. The big picture, so what the why's and the so what's are, then understanding who the people in the room are that are mostly going to care. So it's going to be the stakeholders. It's going to be the people responsible for the work. And if those don't cover it, it'd be anybody else who might be engaged or asked to support, have attention to, or just be aware of what we're doing, obviously, without getting too big of an audience.

Speaker 1: Right. And then during an active project, how do you prefer to engage with your client?

Speaker 2: I prefer a couple of threads. Ideally you have a couple of areas, so you have an IM opportunity, something that's a quick way to just do FYIs and ping, regular check-ins, project status are very important. And then anything that kind of built off of specifically how the work that you're doing, if it would make sense to have an additional touchpoint just for additional strategy or oversight, otherwise key deliverable meetings built into your project and schedule. So you can do a scale, those for freedom to communicate as often

as you can, and short, structured, regular communication weekly, and then as needed oversight, scope, review, and deliverable maintenance.

Speaker 1: Perfect. And then if you think of important milestones or the end of an engagement, how would you like to present your findings?

Speaker 2: I like to present my findings with an easy to digest executive summary that enables a double click if you will into the amount of detail and work that was done to support summary findings.

Speaker 1: Do you think you would like to have it in person or remote?

Speaker 2: Ideally it could be it in person but remote works also with the screen share presentation.

Speaker 1: Okay. And then you believe that there's potential for a follow up. How do you communicate that with your client?

Speaker 2: Context driven communication. So if there's a follow, a follow up is not just, Hey, how's it going? Because we have to implement legitimate questions. Usually you can frame that around some of the value driven bit of the work that we most likely did. Otherwise, if it'd be a follow up for additional work like lateral or extension, that that would be a conversation. So an email works if you're kind of like, Hey, how's it going? But if you've structured something and here's what we'd expect, I would attempt to preschedule some of those conversations so that we could keep tabs and make sure that we're engaged for opportunities.

Speaker 1: Perfect. And in the final scenario, outside of engagements, how do you foster existing client relationships? Is it dinners? Is it email, LinkedIn?

Speaker 2: LinkedIn a little bit, usually for me it's my continued relationships. Most of my classroom relationships with clients is around friendship, around enjoying conversation with one another. So I send articles, I send questions. I regularly just touch base and try and

schedule phone chats. Those are the big ones. I mean, usually, but in my perspective, I don't know if it's too much information, but I talked about the communication methods. If you're able to put together kind of an IM or text situation with them that usually persists outside of a contract, so it's part of establishing strong communication because communication doesn't have to end just because a SOW does. Continue with that same format.

Speaker 1: Yes, that's perfect. And then do you think there are other relevant situations that you encounter your clients that they have not touched on?

Speaker 2: I'd say the only one on top of mind is with some relationships and some clients, they will often invite you to be a fly on the wall in some meetings or to provide kind of a perspective. So kind of being prepared for ad hoc communication styles is important and oftentimes can be last second. So I feel like those have become more common in the last couple of years because people are more comfortable with people showing up on a web, on a video chat, but in the past being in the office means that it was less likely that you're pulled in to a meeting with their boss because physical space in the room is much, has a higher value than you facing a box on a screen.

Speaker 1: Yeah, that makes a lot of sense. All right. Then we're going to shift focus and talk about your opinion on in person versus remote work. Could you briefly describe how you like to structure in person engagements? Is it weekly travel, Monday to Thursday? Is it dinners? Is it special activities?

Speaker 2: It depends on the work to be clear, but in my experience, usually it's a weekly travel schedule. It doesn't have to be a Monday morning to Thursday night, but regular expectations built around communication structure. So, that's why you can build chat. You can do maybe even a daily standup, or a weekly status. Monday, Tuesday,

Wednesday, Thursday, those are the ones that I prefer to travel to be in place for and then it's built around kind of milestone deliverable and status would be ideally if those are in the room. The bigger ones, everyday standups and communications obviously don't need to be.

Speaker 1: Okay. And then do you believe that there are people that especially benefit from in-person work and if so, who would that be?

Speaker 2: I think everybody benefits from in-person work to a different degree, different level. It depends on the work again. So for example, if you've got a big team on site, obviously is a big deal, but let's just go with a manageable team, let's say under eight, getting everybody on a call and doing a brainstorming sessions almost requires more work to get value out of a 50 minute session in prep, than it would to just have everybody show up in a room. So I really value being in the room with the team, particularly if it's us needing to figure out our structure, our approach, our deliverables we need to get smarter on the same thing and share some input. So it kind of depends on what we're doing, but for the most part, I think there's value that could be pulled. Somebody will find the higher value team in person sessions versus the remote.

Speaker 1: Got it. And then last one on in person work. Are there tools, activities or methodologies that you particularly like to use?

Speaker 2: I mean Teams has done a pretty good job for in person. Smartboards are always nice so you can integrate and work with people who may not be able to be physically in the room. Otherwise in terms of physical, there's a couple I'll go first physical and virtual. So physical is whiteboards and papers. Being able to be in the same room and easily share information, create and share information. I mean that's the big thing, as technology improves and we're able to do better online whiteboards and stuff like that. You can

change from that. But for the most part, technology wise from physical in person, just being able to write a piece of paper right on the wall is important. Now. I did do an in person meeting last year which also incorporated virtual. So we're all in the same room but then we all put on VR headsets to take a tour together. And the value was not necessarily taking the tour, the VR headsets, it's afterwards doing everything. I just talked about being able to talk about workflows, process pictures, and draw down on a whiteboard, which you could do in a virtual setting also, but it was a neat kind of blend of in person and virtual, which complimented both seriously.

Speaker 1: That's awesome. Well, I'm actually going to ask you the same questions about remote work now, too. How do you like to structure remote engagements? Is it camera on, voice, screen sharing, interactive?

Speaker 2: Again, it depends. I like to build a structure around it. For daily standups, I let cameras on. I think one of the terms that will start to creep into people vocabulary more often is accountability. Not that it's not a known word, but if you go on a video, it means you've taken a second to be accountable for how you look, for presentation to be looking at the camera. You're obviously not multitasking or eating or playing with your dog. So particularly for standups, which are already informal, the appearance is not necessary, but paying attention is. I like having the camera on, depending on other sessions. I'm tolerant of turning it off because it just depends on what the context, what's happening. But engagement, I prefer on responsible muting and to minimize the multitasking. I just think that, like I said, one of my first comments is that giving a 100% remote environment, I think a lot of people have struggled with that., I think a sense of ADHD has increased as they are constantly and bombarded with extra little things.

Speaker 1: Yeah. I think you're right about that. So then what people especially benefit from remote work?

Speaker 2: I think some developers do, again, I'm going to go back to accountability. I think people who appreciate, understand and embrace being accountable, do really well in remote work. I think that that also kind of feeds into remote work that also blends around the expectation of getting the work done is more important in getting the work done during business hours. Sorry, you can't see air quotes around business hours since it's an audio. So people who have busy schedules, kids, things going on but hold themselves accountable, getting the work done. I think that's their ideal for remote work because it doesn't have to be done necessarily between eight and five. Maybe it's a couple hours from eight to noon, but I can't do anything in the afternoon, but I'll be back from nine to 2:00 AM. As long as the job gets done, that's what matters.

Speaker 1: Perfect. And then do you have any other tools, activities, or methodologies that you particularly like to use in remote engagements? So the blend of technology?

Speaker 2: I've been trying to use the Oculus headset to set up virtual meeting rooms, giving that a shot, but you know, you got to hit that critical mass of participation. So I've been trying to do things like that. Also the virtual whiteboards, I think Mentee is really useful for a level of engagement polls and games and things like that. I think that's about it. I mean the general desktop applications for Teams all already provide so much as a baseline that on top of that whiteboards is something we use a lot too.

Speaker 1: Perfect. Well then we're going to pivot one more time and talk about the future of work. How do you foresee our projects to be structured going forward?

Speaker 2: That's a good question. To be a negative it at Nancy, I don't think they're going to change that much in terms of structure, just because there's the path to change. The way we do

work is going to be predicated on the way that work is structured through MSAs and SOWs. SOWs are obviously easier to change from time to time, but those are then based off of MSAs and until the structure and expectation of the way that work is built around those, I don't think it's going to change dramatically. But otherwise, I think that real changes are going to be based around the deliverable structure and visibility to work. I feel like there's been a lot more work around virtual like boxes with a Google Drive or Teams or SharePoint, different things. It's about visibility and having constant insight to who's accessing what, when and why and for what purpose. So I think there's going to be some conversation around digital identity things that are going to impact. Particularly if we work with vendors and from the strategy group, as we work with our clients how can we quickly and easily integrate into their backend without having to jump through three weeks of legal and technical groups for access. I think that's going to be the biggest driver for speed and agility for the way that we execute work is just about, if we can streamline the way that we can access secure environments.

Speaker 1: That makes a lot of sense. So then when you think about yourself, what would be your ideal work structure?

Speaker 2: I've been looking for those independently wealthy jobs, but apparently they're not hiring. Just kidding. What would be my ideal work team structure?

Speaker 1: Just work structure? Are you traveling biweekly? Are you using VR?

Speaker 2: My ideal work structure would be requirement driven, not schedule driven. So there would be a way to be able to do travel, that would be built around a deliverable structure based on our contract with our clients. If I know that my team, we're going to have to sit down and structure our deliverable outputs, I would want to schedule like a two day workshop with the team. So that'd be an in person. So it wouldn't be an expectation

necessarily. It's demanded by the client for somewhat regular onsite presence. Otherwise, it would be opportunistically built around the need and the value of being in the same place at the same time in the room together.

Speaker 1: Okay. How should we use our buildings? Our innovation hubs, offices, what do you think we should do with them? Or how do we need to change?

Speaker 2: I think that there's a level of further integration. That would be really great. I hate to just sound like a want-to-be technologist, but if you remember a Tom cruise movie a number of years ago, they could do a lot. It's the idea of swipe your screen onto another screen. So I walk in a room with my tablet, my phone, whatever, and I can just swipe it onto the screen that's in a room. I think some level of advancement and technology and innovation to easily air information into a new environment as easily, quickly, seamlessly as possible that can also then be shared with people who are virtually there would be huge. So I think it's a combination. It's kind of like an AR / VR situation which also blends the lines between what's on my personal device versus what can I share and when can I share it.

Speaker 1: Perfect. And then how should we continue to strengthen our company culture? Is it office days and Christmas parties? Is it gifts? Is there anything else?

Speaker 2: You know, I've been struggling with that. I'm not exactly sure. I think that there is a level of physical engagement that people are longing for or don't realize they're missing. I don't necessarily think that's a Christmas party. It seemed that in the past, we needed to make sure to spend money so people can let loose and relax. I don't think they actually need that. I think informal structures is the best way to enter into it. My feedback for events is that we need more of those MD driven, small group sessions that are open and friendly and safe environments to think and learn and talk about, whether you're the expert or you have questions because you're not the expert. I think those are the best first steps to

drive engagement and participation in the company. But I think free stuff doesn't help. I think the most impactful things lately have been any MD safe environment conversations, or even with other leadership, which I've been lucky to have. I mean I got sent some things, I got stuff. A year and a half ago when the company provided us an additional amount of funds, if you chose to use it to buy something for your home office, that was great. I have a big monitor that I bought. And I know where it came from. I know it was from Accenture. So it's one of those things where it's like they do care about me at least from a certain point of view.

Speaker 1: Right? And I have three final questions for you. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: It depends on how it's going, but no. look over here cause I have a sticky note on my monitor I have a bunch of them but one says, what are we doing? Why are we doing it? How is it going to be used? Do you understand the value from a deliverable perspective? And I think that's the big thing to constantly keep in mind. People starting a new project need to understand why, what, how is the solution? The solution is almost secondary to why you need the solution and why you need the solution is the most important thing that a client needs to understand to get on the same page. So any given time ask "why", know your inner eight year old and ask why?

Speaker 1: Well, I think you are kind of answering my next question, too. What makes a client engagement a success in your opinion, but you need to really understand the scoping, understand what you're doing?

Speaker 2: I think that as consultants in the last couple of years that the industry's got better, because it's become more data driven and data driven results and context driven, which

means that any given time, if you're asking why and you understand the value of what we're doing that there's no more questions left, it's just the details of, of executing it.

Speaker 1: Got it. And then do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: As a communicator and one who talks way too much? I feel like that is the key. I think that as everything becomes a little bit easier, technology wise that is, become more advent of technology and the ability to kind of interact with the entire world without ever leaving a room. I think that open honest communication is always going to be the most important thing that we can do to influence what's happening. Like if you do a standup, take the first five minutes to talk about what you did last night, take a couple, make sure you have a scheduled time with teams and clients to talk about stuff that isn't project driven because the personal relationships are the most important part of consulting. Ultimately, you can be the best, most efficient, smartest consultant in the world, but if people don't like you and they don't want you around, then you're not going to do as well as the person who might not be quite as smart as you, but they do like having around because they're going to be invited in the room more often. So personal relationships, communication, honesty is I think the biggest thing.

Speaker 1: Awesome. Thank you so much.

#### **Appendix B19: Senior Manager 4**

Date: Tariq

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes, I do.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Sounds good.

Speaker 1: We're first going to talk about your experience in workplace in the workplace. How long have you worked in consulting?

Speaker 2: 10 years now.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: 18 years in person, two years remote.

Speaker 1: And have you detected any changes or new habits that you've developed since working from home?

Speaker 2: A lot, I used to be more of a whiteboard architect. So I like to be in rooms with people, brainstorming together on a whiteboard discussing integration, architecture decisions, whatsoever. And it kind of shifted for me through remote work, especially with my way of working it was a bit challenging at the beginning. Like for me, I cannot be driving a discussion at the beginning as I used to drive discussions in person. But two years through that you adapt, you get used to making it happen in a way or another through remote tools, such as collaboration software like Mirrow, et cetera, but you get somewhere. At the beginning it was challenging.

Speaker 1: Perfect. And then how do you prefer to engage with your coworkers? Would it also be in person like you just mentioned?

Speaker 2: Absolutely. Yes, I value a lot the human connection and I really feel that having a true human connection or virtual connection, the softwares or technologies are not as genuine as being in person.

Speaker 1: And is that the same for your client engagements?

Speaker 2: Absolutely like the best time in my 10 years consulting, if I want to classify the best working places for me, one is client site, two is Accenture office, and three is remote.

Speaker 1: That makes sense. Then in this next section, I'm going to walk you through seven different scenarios and would like to hear how you would respond to the situation. The first one, you're meeting a potential client and would like to explore if there's an opportunity for a project. Who's your client's stakeholder and how do you engage them?

Speaker 2: Like any, I can give any example, Dean. Sorry, I didn't get the question.

Speaker 2: My idea first step would be meeting them. I would say first at their site, at their client site, in their own offices. Just to open up the discussion, getting to know them better, see what there are like or say what's the appetite for the opportunity that I have in mind? Later on, we can transfer this into maybe some meetings in Accenture offices for demos, et cetera. But I've never felt comfortable discussing business over dinners, especially if it's a new opportunity, new client, first time meeting them, et cetera. But later on, you develop more of a foundation with your clients and then I used to go out to a lot of dinners with clients to discuss either current business or upcoming opportunities. But those were clients that I knew for like two to three years.

Speaker 1: Perfect. We are actually getting to that point where you have an established relationship. So in this next scenario, you're now working on a proposal for this client. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: My target audience would be generally from the CTO CIO organization and what I usually try to close a deal is give them the best possible option for them to either integrate or build a new system or migrate. So I try to give them as many options and being as clear as I can when it comes to numbers. And what can they see the value for, , for me speaking numbers is a key in any implementation. I would say contract closure or finalizing an

opportunity or a proposal or whatsoever like getting to detailed numbers and show them where the value is, is crucial to the success of the discussion.

Speaker 1: Perfect. And then now you're kicking off the new project, who's attending the kickoff and how do you like to structure the meeting?

Speaker 2: It depends, like they're usually at various number of stakeholders. The way that I usually rank the kickoff as you would like to involve as many of the people as you can especially the people that you would acquire support from are not directly involved for them to have some visibility on the project you're working with. Usually, the way I'd like to structure any project I lead is to have a single point of contact for each topic that we have. Like, as an example, if we have a system integration project, I would have a key point of contact or a single point of contact for program management, for architecture, for integration, for build, for test, et cetera. And usually I'm more of a macro manager and I've become a micromanager whenever it's really, really needed and when I see that there are big issues. So I love to see the people that I work with stepping up and taking ownership of the work that they're doing.

Speaker 1: Perfect. I think you may already have touched on the next scenario then. So during an active project, you prefer to divide and conquer the work so that you have one single point of contact. Is that true?

Speaker 2: That's absolutely right. Especially if you're running a huge project, like some of the projects that we are on, the small short term ones, you might end up having one team that all of you jointly own and be responsible for the overall activities that you have, but in longer term, more transformational projects, that's the way I prefer to work.

Speaker 1: Perfect. And then when you think of important milestones or the end of an engagement, how do you like to present your findings to the client and who is attending the meeting?

Speaker 2: Usually it depends on how visible the project is. Let's take an example of a transformation product. It would go up to the sponsor CXO level, or whoever is sponsoring the project. The way that I like to present outcomes is, again, numbers, huge kind of numbers. So I like to put where we were before, where are we now? What's the value that we're seeing? What the improvement, what were we able to tackle or what challenge we were able to solve or what issue we were able to eliminate with whatever work we've done. So it's more target oriented. And I try to add as much numbers as I can.

Speaker 1: So would this meeting be virtual or in person?

Speaker 2: Ideally in person, but like in the last two years I haven't had anyone in person, so there they're all remote.

Speaker 1: Okay. And then if you believe that there's potential for a follow up project, how do you communicate that with your client?

Speaker 2: As a sort of findings of gaps that we identify throughout the project. So if I believe there's follow on work on the current scope of the project or an opportunity for us to branch into another part of the organization that we integrated with or work with during that project, the way that I try to prepare the ground for the discussion is to tell them that what we learned during the last project that you have maybe inefficiencies here, here, and here. This is the first one. A few days later, I would be passing by saying that, by the way, we have ideas, we have some work to do together on these inefficiencies or things that we need to improve and carry on the discussion from there.

Speaker 1: Perfect. And then outside of engagement, how do you foster existing client relationships?

Speaker 2: Honestly, I haven't been put in this situation and I hope I wouldn't be put in because as I told you, it's challenging for me to keep in touch with people only virtually. Before, even when I wasn't on another project, I would still be visiting client X, regularly like once every

two weeks and have a talk with the executives and have a coffee with the people that I used to work with there just to keep the relation open between us.

Speaker 1: Perfect. And then do you think there are other relevant situations that you encounter with your clients that I have not touched on?

Speaker 2: Yeah. I think escalation management would be an interesting one. In person managing escalations, like from my point of view at least is way easier. Because you can better understand really what the issue is while virtually, if someone sent you an email or had a quick call or with you over whatever virtual software you have, it's really very difficult to pinpoint what the client wants and what makes it even more difficult is that usually these meetings or these emails are being sent to a group of people. And usually when you have the in person relation, you would be able to work with the person after that escalation meeting or whatsoever, try to ask follow-on questions, try to better understand really what's the root cause or the issue. Whereas the virtual, from my point of view, doing this virtually is really challenging because you cannot get the same sense of what the issue is that you can get in an in person kind of setup.

Speaker 1: That makes a lot of sense. All right. So then we're going to shift focus and talk about your personal opinion in person versus remote work. How do you like to structure in person engagements? Would it be weekly travels Monday through Thursday? Is it going out to dinner? What does your ideal structure look like?

Speaker 2: Definitely in person, not fully in person, honestly after the fact that we worked from home for two years. I believe that we're getting to a place where I still highly believe that having in person days is extremely important, but I think it's not going to be necessarily a hundred percent of the time, maybe 70% might be a good balance. But I really still believe that in person relations is extremely important. The way that I usually used to engage with my

coworkers or the people I work with on the client side is definitely through dinners. If there are any specific celebrations, if they have even internal events in their company that they invited us we would go and sometimes invite them to our internal Accenture meetings. I used to always try to grab the chance to walk with people around the organization. So whenever anyone is going to grab a coffee, I would go with them just to foster their relation, try to strengthen it a bit, try to spend some time. Especially if I have a few questions, I would like to get your questions outside because it is a more friendly set up and it's way easier than having it written over email or being asked in a meeting in front of 20 people.

Speaker 1: That makes a lot of sense. Yeah. And then do you think that there are people that especially benefit from in person work?

Speaker 2: I think so. I think in person work is very importantly. I believe personally I used to be maybe 20% more efficient when it comes to working with people in person. If I compare it with now, with remote work, especially when it comes to tasks, I would say assignment, task reviews, alignment between different team members, I personally believe that having these activities done in person is more efficient than being done virtually. So I still believe that we need an element of in-person work.

Speaker 1: Great. And then, I think you already answered this one but do you have any tools, activities, or methodologies that you particularly like in in person engagements? I think whiteboards and sticky notes, correct?

Speaker 2: That's absolutely correct..

Speaker 1: Then I'm going to ask you the exact same questions about remote work. So how do you like to structure remote engagements? Is it voice only, camera on, screen sharing, interactive?

Speaker 2: I prefer always screen sharing. I'm not a huge fan of video just for the fact that I personally don't feel comfortable talking on a camera, even for personal reasons. So I'm more of a share your screen, walk people through content, show them progress and talk over it, but really working collaboratively with people. So I try to mimic the same way that I used to work in person remotely. Like before I used to put people in a room, have a whiteboard, have a couple already pre-populated. Like if you ask me personally, is it enough for parents to be with their kids only two days a week? I will tell you perhaps not from my point of view, I believe like four or five days a week is something important to have with your family, at least extended to a couple of hours that you get in the evening sometimes, or most of the times are not enough. So I really believe having remote work helps lot of people connect better with their family, maybe having a better relations with their kids.

Speaker 1: Perfect. And then what tools, activities and methodologies do you particularly like to use?  
So screen sharing, mirror, right?

Speaker 2: Mirror and Mural, right.

Speaker 1: Okay. Any other ones?

Speaker 2: Those are the main ones. Like when we first started working through the pandemic, we used to use PowerPoint a lot and Teams and shared folders and shared files, et cetera. But I really believe they're not efficient enough to facilitate remote work by themselves as standalone tools. You need something more of a brainstorming and collaboration space.

Speaker 1: Perfect. Then we're going to shift focus one more time and talk about the future of work.  
How do you foresee our projects to be structured going forward?

Speaker 2: You mean in terms of framework versus in person work?

Speaker 1: Correct?

Speaker 2: I would say a clean set up being 40%. Like if I consider everyone's role in a project, I see it like 60% remote, 40% in person. Maybe for our leadership or for the people who are in direct contact with the client, it's going to be the other way around going to be 60% client, 40% remote. But those are the ranges I can think of.

Speaker 1: Great. And then personally, what would be your ideal of work structure?

Speaker 2: I'd say 60 % remote, 40% in person.

Speaker 1: Okay. And how should we use our buildings going forward? Like our innovation hubs and offices and all the infrastructure that we have?

Speaker 2: Well, to be honest I've never seen like a lot of people in the Accenture offices. So Accenture offices have been always a place where you go to meet our colleagues, have internal meetings, have internal brainstorm, but most of our times we were working from the client side anyways. So I'm not sure whether there was any expansion that requires people to be in the office other than in the delivery centers. I think we just need to let go of them. I still believe we need to have offices for sure. But if they have too much, maybe this is more of an expenditure.

Speaker 1: That makes sense. And then what should we do to continue to strengthen our company culture? Do you think it's office days and Christmas parties or gift giving, or do you have any ideas on that?

Speaker 2: I think the challenge that we're facing culturally, essentially recently is due to the very high velocity and the increase in our number of employees and that both work at the same time. So we're getting more people and we're not able to connect with them at a really human level to create, I would say, create long lasting relations with them not only working relations. I see this is for us to go back to having an element of an in person work, definitely gatherings, dinners, Accenture events, especially in person events. They help a

lot for us to connect together. I still believe in that there is a huge gap between where we should be culturally and where are we now. It's not something that anyone can do anything about, but I hope it's something that will resolve itself moving forward with the easing of the restrictions.

Speaker 1: Perfect. And then I have three final questions for you. So what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Show progress, show numbers, but really if there is anything I learned, lean authority. In remote work people have way less patience to see results rather than in person. Like in person, they would be talking, but when you're in the call, they expect to see outcomes right away.

Speaker 1: Got it. And what makes the client engagement a success in your opinion? So that would be showing the progress and meeting the targets, I'm assuming?

Speaker 2: Showing value, but I'm a huge value of surprising the clients. Like even if there's something that we're working with and we know for a fact that our next logical step would be X, I'm a fan of having X ready and show it to the client before they even ask for it. I really feel always proactivity with clients is what makes them more excited to work with us more. Even in our last project, if we left it only to just what should do, I wouldn't think that we would have got the extension. The extension was more of what we've done that we weren't supposed to do. So always showing extra value, showing proper progress. Building content, clean content is vital to the dispatch or relation with the client.

Speaker 1: Great. And then do you have any other last pieces of advice or thoughts on the topic that you would like to share?

Speaker 2: Overall, maybe this is my personal reflection on the situation that we've been in for the last two years, I share the pain of anyone who's been suffering for the last two years, to

be honest. Like I've been through times where I started questioning whether remote work would actually work for me as a person. We all adapted and I hope that we all get back to normal soon. Aside from that, I would just circle back in with what I said like showing progress and ordering your content.

Speaker 1: This is perfect. Thank you so much.

## **Appendix B20: Senior Manager 5**

Date: Tara

Speaker 1: I'm conducting these interviews for my DBA research and would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: All right. So then we're first just going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: Loaded question, I have to go back in time. So over 20 years.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: I would say I probably traveled for about 15 years.

Speaker 1: Okay. Have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: I think working from home is a different dynamic. For me personally, I think it impacts everyone differently, for me in terms of habits, I think that I honestly feel like you can be more productive because you're more focused. When I was traveling, you have a lot of the hallway conversation or informal meetings and I feel like working from home kind of

forces you to be in, not in a good way. So it's something that I've been conscious with. I would say definitely over the past 18 months, given that this has been really almost two years, and the first six months it almost felt like you had to constantly be tethered to your computer. But I think that after everyone realized that this was going to be a much longer-term effort, I think for me personally, I kind of figured out a way to work smarter and take in the breaks, because I do think that's necessary. You know, step outside and get some fresh air or actually leave my computer. And even if it's just having lunch in the house, just to step away. So that's kind of where I feel like my habits have changed and it almost felt like when then we were in the office, you took more breaks, but it almost feels like it wasn't scheduled and it feels like working from home, you have to schedule your breaks, if that makes sense.

Speaker 1: That makes a lot of sense. So then how do you prefer to engage to coworkers and clients? Would it be remote, in person, a hybrid?

Speaker 2: I honestly think that we'll probably go more towards a hybrid model. And when I say hybrid, I don't think it requires 50% onsite. Before in consulting it was a hard requirement, 100% travel. When I first started my consulting career, it was sometimes Monday through Friday, it was really intense. And then it started transitioning Monday through Thursday. And then, as I progressed in my career, in working with teams and especially when I work projects where we have a larger team, I was very into the flag schedule. So yes, we could have onsite presence even if it's four to five days a week, but maybe I would travel Monday through Wednesday and then someone else would be on site and be the face for the client the second half of the week. For me, the actual transition to working 100% from home has been good because I had actually started to reduce my travel during the week, even if it was for just a couple of days to attend key meetings. That's really how, pre-

COVID, I had started to structure my onsite presence. I think being on site for larger working sessions is beneficial and to have that face time and build your client report, but I don't think it's necessary even 50% of the time. I could see going back to travel maybe 10%, 20%.

Speaker 1: So this needs leads really nicely to the next phase. I'm going to walk you through seven different scenarios and what I'm primarily trying to get out of them is to see when you think it'd be important to meet in person and when you could do it remote. So in the first scenario, you're meeting a potential client and would like to explore if there's an opportunity for a new project, how do you engage with this person? Is it in person? Is it a phone call? Is it an email? How do you start building a relationship?

Speaker 2: I would definitely say , if I do have the opportunity to meet in person, that that's always ideal. But if it's not, I would recommend a call.

Speaker 1: Okay. And then if you're working on a proposal for someone, who's your audience and what do you do to successfully close to deal?

Speaker 2: So if I'm working on a proposal who is my audience; so the audience would typically be, and I'm assuming on the client side, I consider that it could be one in the same or it could be a couple different people, but it would be the user and economic buyer. So sometimes they're one in the same, sometimes they're different people. And how do I successfully close the deal? Depending on the nature of the proposal, I've actually had it both ways. I've had it where it was an orals presentation or where, in this the two years that we've been working remote, via a Team session, but it's always cameras on, being very personable and selling your story.

Speaker 1: Perfect. And then when you think of the kickoff of a new project, how do you structure that meeting? Is that in person, is that remote?

Speaker 2: I prefer if we do have the opportunity to be in person and it doesn't have to be everyone, the entire team, maybe just to have the key facilitators in person. But like I said, if we were in a world right now where it was 10%, 20% travel, I would consider a kickoff a key meeting that that I would want to be in person for. But right now in the situation that we're in, it would definitely have to be remote.

Speaker 1: Well, and then during the project how do you engage with your client? I'm assuming that's primarily remote?

Speaker 2: Yes, and I mean a lot of it too, we have scheduled meetings with our client or the ad hoc quick calls and pings. The other thing that's really changed within my career is that I'm 100% accessible. It's not just email and phone calls, it's text messages, it's Teams, it's chat, it's all these different avenue to reach people.

Speaker 1: Yeah, that's a good point. And I think we'll actually get there in two scenarios. For now, when you think of important milestones or the end of an engagement? Would that be in person to present your findings or would that be remote?

Speaker 2: I would consider that key, whether it's transition closure or it could also be an opportunity for follow on work. So I would consider that a key in person meeting if we had the opportunity.

Speaker 1: Well, you just started my next scenario. So for follow on project, how do you communicate that? That's in person ideally?

Speaker 2: Yes, because you use that it's a good delivery and it's a good opportunity for an extension.

Speaker 1: Got it. And then this is the one that I was going to get to. So outside of engagements, how do you foster existing client relationships? That I have heard before is that because we are so accessible, having the text messages and the more informal communication that

has transitioned to be more important for the relationship management. Do you agree one and then two, do you want to add to that?

Speaker 2: I actually do. You know, it's funny because sometimes I'll find with either my clients or coworkers that they'll even leverage chat as a venting mechanism or a sounding board. And you know, just like if you're on a call and it's tough or you want to get someone else's advice. So I definitely agree with that.

Speaker 1: Perfect. And do you think there are other situations that you encounter with your clients that I did not touch on?

Speaker 2: No. We really covered the day to day. You're always going to have situations pop up, whether it's tricky situations, whether it's an out-of-scope request or support in other areas that they may not have the funding for. It's really just balancing the task at hand and in figuring out where we can pursue additional opportunities.

Speaker 1: Perfect. So then we're actually going to shift focus a little bit and just talk about your opinion on in-person versus remote work. How would you like to structure in-person engagements? It sounds like it's definitely not every week, Monday through Thursday but when you do get together, would you have dinners, special activities, anything like that?

Speaker 2: I was always big on that, especially with my clients, because like I said, everything's so scheduled right now and everyone's working so hard and fast. Sometimes, for example, the only time you can get people together is over lunch hour. So I was always conscious if I did schedule lunch meetings, we would bring in lunch and make it light. Or similarly, if it was an early morning meeting, I would try to organize a breakfast. And the dinners are always fun. The dinners typically would be more social and it wouldn't really be a working type dinner. So it kind of just depends on the level of activity and the items that need to be accomplished in terms of how I would structure, whether it be breakfast, lunch, or

dinner. But no, I definitely think that's great relationship building too, whether it's with your client or with your internal team.

Speaker 1: This is perfect. So then do you believe that there are people that especially benefit from in person work and who would that be?

Speaker 2: You know, I do. I think that I don't think working remote is for everyone. I think you definitely need to be very time management focused. For me it was a pretty easy transition, but I did have to change things. So for example, I would fly from Texas to Philadelphia and I had a substantial amount of time on the plane or at the airport where I was able to work on deliverables. So now I need to carve out time within my day, it's just time management to be able to complete my deliverables so I'm not working late at night or having to work on the weekends.

Speaker 1: That makes sense. And then are there tools, activities, or methodologies that you particularly like to use in in person engagements?

Speaker 2: I mean what's interesting for in person, you have a luxury of a lot of design work. So you have the luxury of a whiteboard where working remote, they have the tools such as Mural and things of that nature. I don't find them personally to be as effective. I think that when we're having the brainstorming strategy sessions, I think keeping it simple or whatever my approach is. When I have client meetings scheduled, I like to come prepared. And even if it's one slide to get them to react to something and just a few bullets on the slide, I always want to bring something. Because like I said, everyone stretches it. We don't have time to just schedule meetings to have meetings. So I'm always really big on the inputs going in to the meeting. And then what are we trying to accomplish in the outputs.

Speaker 1: I think you are starting to answer my next question. So for remote engagements, how do you like to structure those? It sounds like screen sharing is a big one?

Speaker 2: Yes, definitely. And depending, I also am very conscious of am I an active participant? So will I have a speaking role or am I just kind of listening in and when if I am presenting, I typically, depending on the audience and my clients, some of my clients are 100% video. Others are not on video. So if they're on video, I'll be on video. If they're not, I'm not either.

Speaker 1: Okay. And then who do you think especially benefits from remote work?

Speaker 2: So for me personally, I'm married with children, and so I can tell you I'm a lot happier. I don't have that weekly stress trying to figure out, okay, I'm traveling and making sure that everything's taken care of while I'm on the road. I think people who, and it doesn't even have to be humans, it could be people with pets or people with children, I think it really takes the stress off having to manage all that well while away. Just being on calls and hearing from different colleagues, I think some of the insights that I've gathered is some of the younger, single people that I work with that they loved being on the road. They loved the benefits, the travel perks, the per diem. For me, I mean it was a nice to have, but I definitely feel healthier. I just not tired all the time. I can definitely see the benefits of being home and not doing that weekly travel grind.

Speaker 1: That's great. So do you think there are other tools, activities or methodologies that you'd like to use other than screensharing and the basic MS Office functions?

Speaker 2: Like I said, if I'm not an active participant like I had a call late last night, it was cold out, but I said, okay, I'm going to get up and out of the house. I've been tethered to my computer all day, and I'm going to walk and listen while I'm on this call. So I think that maybe setting expectations with the team, like saying, I know we have a call coming up. It's going to be informal. If everyone just wants to put their headset on and take a break.

We'll just keep it very informal and casual. I think kind of setting up precedence is good. And I think people enjoy it and I think they benefit from it.

Speaker 1: I absolutely agree with you. So then I'm going to shift focus again and we're going to talk about the future of work. So how do you foresee projects to be structured going forward? So it sounds like it's maybe 10% travel and then maybe more expectation management on, Hey, this is informant. You can take a walk. Does that sound about right?

Speaker 2: It does. And I think, just with the 10% travel, I think our clients too are just seeing the benefit. Not only is the work getting done, but also just the financials, the money that they're saving. Typically we will structure our contracts to have vacant 10% travel. and, when you have a \$1 million contract, that's \$100,000, that's a substantial savings.

Speaker 1: For sure. Is this also your personally idea work structure than you're describing? Or would you add to that?

Speaker 2: No. No, definitely. I definitely think that I've settled and have been able to be so productive over the past couple of years in this new way of working. I definitely think that for me personally, the minimal travel going forward is something that I'll be looking for.

Speaker 1: Perfect. So then how should we continue to strengthen our company culture? Do we do office days? Do we do Christmas parties, gift sending?

Speaker 2: I think all of the above and I think honestly our company will shift. I'll give you an example. I did holiday gifts for my team and I received all of the required approvals, but yet I still got audited and have my hands slapped not to do that again. And that's frustrating. I mean, we're all working hard and fast, my team has been very profitable, but yet I get dinged for something like that. So that I think definitely is a shift across our company. I don't think it'll happen overnight, but hopefully something that will happen over time.

Speaker 1: I hope so, too. Also if we do talk about the office, how should we use our buildings? Is it for get togethers? A lot of people have said they want them to be more collaborative.

Speaker 2: I definitely think keeping it social and collaborative is the way to go. Yes, I understand the work also needs to occur in that space, but I think having that ability to show your people appreciation is important.

Speaker 1: That's perfect. So then I have three quick final questions for you. Number one, what's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Definitely stay present and relevant. I think in this new way of working, it's easy to become kind of out of sight out of mind. So having those regular checkpoints and the frequent communication and updates is important.

Speaker 1: Perfect. And what makes a client engagement a success in your opinion?

Speaker 2: My opinion is a couple of things. So building that client relationship and trust, I think trust is extremely important. And you know, my success is my client's success. So when I continue to over deliver and have great work outputs, that's not only a reflection on them. It's a reflection on both sides.

Speaker 1: Perfect. And do you have any last pieces of advice or thoughts that you would like to share?

Speaker 2: No, I actually think this is a very important topic. It's something that's very near and dear to me just having seen how my quality of life has improved. I really don't think of it as everyone's has previously asked how do you do the work life balance? Well I mean, sometimes we'll take calls as you can relate, we work multiple time zones, we'll take calls early in the morning, late at night, but it's just being able to manage and maintain everything. I think is important. And I hope that to realize that and have a similar

sentiment as I do in terms of continuing to work remote that and travel less going forward when things do start opening up.

Speaker 1: This is so perfect. Thank you so much.

## **Appendix B21: Director 1**

Date: John M

Speaker 1: I am conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: I do. Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: That sounds good.

Speaker 1: In the first section we're just going to talk about your experience. How long have you worked in consulting?

Speaker 2: 23 years.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: 21 years in person. And then two years remotely, the last two years.

Speaker 1: And have you detected any changes in yourself on your habits that you've developed since switching to primarily working from home?

Speaker 2: I think there's more preparation time being virtual. Usually when you're working in the office you're working closely to the client. You have opportunities to engage in just more than 30 minute meetings. You may meet after work or talking in the hall, you have these opportunities to get a little bit more insight that you can put into your deliverables or into the conversation. You get more insight from them in terms of how they're operating. People tend to be more candid one on one versus virtual and so I think there's an extra

level of work that needs to be done in preparation, just given you're not sitting side by side with the client

Speaker 1: That makes a lot of sense. So then how would you prefer to engage first with coworkers and then with clients?

Speaker 2: I think a lot of what we do in consulting has to do with trust; trust in our capabilities, trust in what we're trying to accomplish, trust that they're getting value out of the work that we do. And the feeling that I get is that unless there's active contact, unless there's direct deliverables that they see and see you gauging, that trust, that growth of that trust can be limited or constrained. And so while I'm not suggesting that we need to go to a full model where we have to be face to face with the client every day, I think in the heart of some normalcy, there should be some percentage of time that we interact with them. In building that trust both professional and, building kind of a human relationship with what we do.

Speaker 1: Well, that leads really nicely into this next phase, because I'm going to walk you through seven different scenarios that we encounter with clients and I would just like to hear how you would ideally structure or deal with the situation.

Speaker 2: Okay. Sure.

Speaker 1: Perfect. So in the first one, you're meeting a potential client and would like to explore if there's an opportunity for a project, who's your stakeholder and how do you engage with them? Is it an email, is it a lunch? Is it a workshop? How do you have a first conversation with someone?

Speaker 2: Well, I mean oftentimes there's a call or an email to, but generally speaking, I like to meet someone. And I also don't like to just jump right into to business unless somehow that's how they're wired. This weekend is an example, I got a new hot water heater replaced

and we didn't necessarily jump into his technique for doing that. I was more sizing him up in terms of, do I feel like he has a competency in this space? Is he going to give me a fair price? And some of that is just a history of what have you done? What's your experience and things like that and getting to know him a little bit, and I think it's the same in consulting. You want to get a sense of the person and what they're actually trying to achieve and it becomes very difficult on a phone call. Usually, phone calls are rushed, they tend to be very limited in terms of body language. And just the degree of, I'm not sure if intimacy is the right word, but it's a picture on a and I don't find it as effective as meeting someone in person. And I find that not just with clients, but even internally. When we are able to meet face to face there's a degree of interaction. And then it seems much more productive than if you are meeting virtually.

Speaker 1: That makes sense. So then when you are working on a proposal, who's your audience and what do you do to successfully close the deal? Do you also meet with them in person throughout the proposal creation? Is there anything else that really helps you?

Speaker 2: I think to the degree that you stay and step with them, you're going to have the highest degree of success. You know the world kind of move moves under your feet and what you start the proposal with may not be as accurate when you finish the proposal. So if you have an opportunity to meet with them and clarify items, if you have an opportunity to test ideas with them and really get a better sense of the situation, then you're much more likely to hit the mark. A lot of people think just because we have words on slides that that's the proposal, but oftentimes it ends up with a proposal that's too generic for them to understand how they would do something in their environment. And that's really what they're after.

Speaker 1: That's great. So then of course you won proposal you just submitted, but who's attending that kickoff call? Who are the stakeholders and how do you structure a meeting like that?

Speaker 2: Generally, in the kickoff you want to have people at all different levels and some of the most important in a kickoff is their senior executives or their sponsors and they have to do a fair bit of communication. They need to talk about the goal, the objectives, where they see and answer questions and get their directors and managers all on board with what's happening now. You don't necessarily want to bring every single person all the way down to every single worker, but you want to have enough of the organization where they understand and a bit of the carrot and the stick. The carrot being the incentives and the value that they get out of it, the stick is kind of like the business objectives that they have to meet and understand that there are consequences for not helping out with this and it's not meant as a threat but to drive through change. They have to hear it. I had a chief accounting officer once, we had a kickoff and she stood up and basically said, look, we made all the decisions we're burning the bridge behind us. And so no one was talking about how do we go back or re-visit some questions. It was all about how do we make this work right forward looking? And I think it takes that leadership to get people aligned in that direction.

Speaker 1: Perfect. And then during an active project, how do you prefer to engage with your client?

Speaker 2: I like to meet with them in person where we can keep up with the status and everything, and just keep them outside of just the status and all that is clear communication, whether through email or calls. Just to make sure they feel like they're in the loop and that they are part of the process versus, you're often do working and you're going to deliver something to them in eight weeks' time without consulting with them. So, I try to be very open at the beginning about how much time they need to put into it, even down to the

number of hours per week that they should expect to be engaged. And I think that helps because they open up their calendars. They know that was an expect and it helps, especially as you need their feedback and input more and more towards the end of the process.

Speaker 1: Which is the next question. So when you think of the end of an engagement or just an important milestone, how do you present your findings?

Speaker 2: Well, one, I don't surprise them, meaning they know what the findings I'm about to show them are. We've gone through it. They were part of the process and they're bought into all of that and then usually their final report is more to their senior leadership. And so we have worked with the people that we have been collaborating with, they understand the content they're prepared to co-present that, and really oftentimes what I do for an executive meeting like this, I like to start with what our findings are. And just lay it out and then go in and talk about what our evidence is afterwards. Because essentially what that allows is for the executives to understand what we're about to say and then listen to the conversation to see if they believe what we talk about. To support those conclusions versus, I've been in some readouts where there's all sorts of background information, there's all sorts of content and the executives have no idea where you're going with this. And so they don't, they don't really even know how to think about it. And then at the end there's a surprise and then you have to go back review slides you've already done because now they understand where that's going.

Speaker 1: That makes sense. So then if you believe that there's potential for a follow up or phase two project, how do you communicate that? Would that be during the final project? I'm assuming it's earlier because you want to keep them involved so you would find the opportunities early on, correct?

Speaker 2: Well, it's interesting. I mean, oftentimes depending on the work, the client already knows, right? You're doing kind of like a phase one, phase two kind of thing. They only want to start with phase one. So it's almost part of the conversation and if not as you start developing your recommendations, you build a solid case for what is coming up and what should be done. And as long as they believe you, and as long as you have the integrity to give them the unvarnished truth, then oftentimes, personally from my experience, it's the client that asks for the next wave or the next phase. You have to be very careful, it's a balance, right? Because you give them visibility to what's next, but you're also there to deliver value. You're not there to continue to sell work and so you have to be a little bit judicious about how you approach that. The best way is clearly articulating the value of the work that you've performed and building sufficient trust that, should they want to move forward, that it becomes sort of their idea to do that.

Speaker 1: Got it. And then outside of engagements, how do you foster client relationships? So when you're not in structural, like biweekly meetings, how do you foster the client relationships that you have?

Speaker 2: It's a good question. You know, I think there's always opportunities for connections outside of meeting and some of it may be related to work. You have business events that you want to invite them to, or you have other activities that you would like to involve them. International women's day is a good example, inviting our clients to those things that's outside of the work that they might be interested in or corporate citizenship. We have corporate sponsorship, we have corporate citizen activities, and we sit on boards in the local community and so we maintain relationships where it's not transactional. We're we are involved in situations where we're both trying to help the community or help a charity without trying sell something. I think a lot of that is even just being on site at a

client, this is where it becomes very hard. When you're in a client site, you walk the halls, you see people that you may have worked with two years ago, you may meet some new people, you get introduced to people and you just continue to keep the lines of communication open. Whereas, in a virtual setting that becomes very hard to run into someone at the cafeteria. You have to be in a meeting together, and even in a meeting, if there's lots of people you may not even get a speaking part. So, I think it's just being very intentional and authentic about really wanting to get to know someone and finding the opportunities to do that.

Speaker 1: Got it. So do you think that there are other relevant, situations that you encounter with clients that I did not touch on?

Speaker 2: I think all of these, you're getting to sort of how do you build real relationship? How do you foster the best collaborative situation? And my experience is that initial meeting t just getting enough interest to have another meeting, essentially. The thing that differentiates a real relationship and trust is clear communication when things don't go well and being able to have the harder conversations, like if they disagree with you or if, something negative happens, or you're in a disaster. How you react in those situations is much more telling and is much more indicative of what your relationship with them will be like in the future. A lot of these questions are related to the first conversation and getting in and how do you work with them but I think having that integrity to work with them and be fair to them, regardless of the situation, I think is a paramount effect that needs to be there. And oftentimes that can be hard, especially in a virtual environment where you're not seeing people in a crisis situation face to face. Well then in the end, I've been getting a lot to remind people that we're all human. I think bringing everyone to the next level of being more personal and approachable and even willing to share when a crisis is

happening also just requires more time and that is more important to really meet with someone in person. So you can pick up on the smaller cues other than just the words being said.

Speaker 1: Okay. So then we're going to shift focus one more time and talk about the future of work. How do you foresee our projects to be structured going forward?

Speaker 2: I think a lot of it will be driven by what our clients want and that is and will be for the near term some sort of hybrid environment. I think that senior folks will probably travel more because they've got, closer ties to the steering committee meetings and statuses and whatnot, and they control their teams. And so a lot of people will be in a hybrid model and that's kind of where the industry is going, is more of a hybrid approach. And even internally, even though everyone likes to work from home, the biggest question I get is still, when are we going back to the office? When do I get to collaborate with my colleagues? When do we get to meet in person? So people want that interaction. And they will come into offices, they will interact, especially for things like trainings. A big collaboration to feel part of something and a part of an organization. I think we will head start heading towards going back to the office, and it will increase. And then, I maybe I'm a cynic, but I think in the long term it's going to return to a situation very similar to what we had before. I think that there are some factors that make people want to go into the office, especially like career progression. There's a saying, out of sight out of mind, and I believe that there will be a bias or favoritism to people that they see every single day versus the person they don't see. And so it will have an impact in terms of career progression and things like that. And people will start to go into the office more and clients, especially in professional services, they want to see and touch, figuratively speaking, the people that they're paying for. And so as they go back to the office, they're

going to be asking for consultants to go back to the office as well, that may be several years out. If the pandemic has taught me anything, is that people have very short memories and they spring back to what they know pretty quickly. I mean, as soon as things open up, people jump into mass meetings and things like that. So it seems unlikely that work from home will last that much longer into the future. And, one economic downturn or one recession, and all of a sudden it's the worker that's at a disadvantage and all of a sudden, people will be going to the office more. I don't know, maybe I'm just old and cynical, but that's sort of the way I see it playing out over the next few years.

Speaker 1: Okay. I think you also answered my next question, which would be, how should we use our buildings, like our offices in our innovation hubs? The other addition I got from previous interviews is to really showcase how innovative we are and live it so that we can sell it easier. Is there anything you would like to add to that?

Speaker 2: Well, that's kind of the million-dollar question. Which is, what does the future of work look like and how we interact? And some of the things that I hear from people is that we don't want to sit in a cubicle or an office by ourselves in the future. We can do that. We want open spaces, we want collaboration. We want very flexible space so that we could have a meeting with three people or we could have a meeting with a hundred people and it's really to kind of foster collaboration and engagement. So I think there'll be more open space, more meeting space, less office space person and I think that there will also be the technologies that drive this. And the technology will improve such that if people do work from home, they're able to participate as much as someone that's in the office. I've had some hybrid meetings where some people are on the phone, some people are in the room. The people on the phone are completely forgotten and they hear people's newspapers or noise, and they can barely interact. And that that's going to have to

change, if we're going to be successful in the future. I think there'll be better technology, better placement of technology, and making those meetings more worthwhile than it is today.

Speaker 1: And then do you think there's anything we need to do to continue to strengthen our company culture? Before we could do Christmas parties and summer parties and just bigger get togethers. Currently we give a lot of gifts and have virtual engagements. What should we ideally do to continue to strengthen our culture?

Speaker 2: I think the biggest thing that we can do, and one of the things that took the biggest hit, was individualized attention. There's no one size fits all for everyone. Everyone situation is unique. So we sort of have to stop talking about what's work from home. It's what's work from home for each person. And that's, I think, where it helps to be in the office because you can have more one-on-one. One of the things that is somewhat paradoxical throughout the pandemic is, people say they're not engaged, or they don't feel connected. So what do we do? We have more town hall calls. We have more meetings but those meetings are more of like a readout, people talking, lots of people listening. It doesn't give you that individualized attention that people actually feel they're part of something. I find meetings with like 80 people, four people talk and everyone else just kind of sits there and they're half engaged. And so we really need to think about people as individuals, what their needs are and structure our corporate culture that provides that now. I think we're farther ahead than other companies, because we have things like people leads, but I think we need to go further. I think we're going to need more mentoring programs. We're going to need to have situations that are flexible for people and that fits what they are individually looking for.

Speaker 1: Perfect. Then I have three quick final questions for you. What's your number one advice that you'd give a person currently managing a client engagement?

Speaker 2: I guess it's, talk to your client as much as you can. But that's only second to, number one is take care of your people and stay connected with them, make sure that they kind of understand what they're doing, how it impacts the future work, because it all kind of works together. I think that you also need a little bit of grace and a little bit of patience and understanding that people have difficult situations, especially those that are dealing with family support and other things. And so I think there's a degree of grace that you should give, not just to your people but to yourself. This is a difficult time and it's an extraordinary situation and they should give themselves some latitude.

Speaker 1: This is perfect. And then, what makes a client engagement a success in your opinion?

Speaker 2: I think the first and foremost thing is really understanding what they're trying to achieve. I think that people rush a little bit without really understanding what they're to accomplish. And we also think about value as the way we think about it versus how the client thinks about it. A lot of deals that we do, a lot of our clients, they're buying \$10 million, \$20 million projects. I mean, effectively, they're betting their entire career that you're going to make them successful, and you have to approach it as such and take it that seriously, and really understand what they're trying to accomplish. And if you do that, if you really try to figure out what they're trying to do, you're going to help them out and they will trust you more. They will help you more. They'll give you more flexibility and they'll be willing to agree that it was successful.

Speaker 1: Perfect. And then do you have any other pieces of advice or thoughts that you would like to share about anything from current work settings to the future of work and how we engage with our coworkers as well as our clients?

Speaker 2: I think in the near term, because people will work remotely and because a lot of work has been shown to be able to be accomplished remotely, we're going to continue to see the age of resignation, we're going to see lots of people changing jobs. The differentiator I think, is going to be who has the strongest culture, who can articulate what we are trying to and really make it individualized. Like what's the worth of the work that they're doing. And that fosters loyalty, that fosters passion and the companies that can do that the best will be able to retain people. The companies that think about just how do we automate, how do we find efficiency. they're going to lose, because they're thinking of an outcome based on the company's bottom line versus thinking about their people and what are we trying to accomplish and providing an environment where people feel fulfilled and satisfied above and beyond of the dollars.

Speaker 1: This was perfect. Thank you very much.

## **Appendix B22: Director 2**

Date: Jorge

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Yes.

Speaker 1: The transcript will be made anonymous and attached to the final project, is that okay?

Speaker 2: Yes.

Speaker 1: Okay. So in the first section, we're just going to talk about your experience in the workplace. How long have you worked in consulting?

Speaker 2: 12 years.

Speaker 1: How many of those years have you worked in person and how many remote?

Speaker 2: I've started working remote before the pandemic. So that's January, 2020. So that's two years. So 10 years in person, two remote.

Speaker 1: And have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: Yes. I feel physically healthier but mentally not as healthy.

Speaker 1: Because there's not as much of a divide between work and life?

Speaker 2: Yes. Physically healthier because my working person was essentially a hundred percent travel. And in a hundred percent travel setting, it is harder to establish routines and healthy habits, as well as I think the travel itself takes a toll physically on you, especially someone who is 6.3ft on airplanes. I'm just compressed, everything's compressed, everything physical, let alone the little compression of air inside of an airplane but for someone who's tall, it takes a toll on my body. Establishing healthy habits as going from location to location can be hard. Having a routine for working out is hard. Sleep gets put off depending on time zones and the fact that you're not in your own bed. So from a physical perspective, being at home, you can correct. Some people choose not to, but you can. And I've lost a lot of weight since I started, so physically, I feel probably the best I've ever felt in my life. Mentally however, it's the opposite when you're on a plane or when you're traveling, the travel itself, the commute itself allowed me, it doesn't create it for everybody, but it would allow me to establish physical and time separation from work. For example, when you're in on a three hour flight, you can choose to work, but regardless, it's quiet time, you're not in consistent conversation about work because if you are it is in a social setting with your neighbor rather than on calls. And you can choose to spend the time either watching a movie or reading a book or listening to music. So your brain can relax from being always on. To find the finalize that thought, it's also your

coworkers being in the travel setting reduces the amount of people pinging you, calling you at any given moment in time, because everybody has that downtime. And that downtime has a downstream effect on those that are approximate near to you. In contrast, when you work from home, it is less of work from home and more of live at the office because you can't create physical or time balance separation from your work. You're always accessible. You're always connected. It is harder to manage your calendar. And I talk about the downstream impacts of others around you. If everybody's working from home, then the concept of calendars and the concept of availability becomes incredibly fluid. And almost relative, my availability is relative to yours, which means that you can choose to ignore my availability in favor of yours. And thus, I have to adjust because you're assuming that I can adjust because I'm connected and available. Whereas before if I was on a plane, when I'm on a plane, there's literally nothing you can do about it. There's nothing anyone can do about it. I could be on two calls at the same time, because that's the best time that works for you and I have to make a decision that if I'm on to prioritize the calls, because even when my calendar is blocked, people will take the slot. I don't know if that that's clear or enough.

Speaker 1: That's very clear. That makes a lot of sense. And you're actually not the first one that has mentioned a physical and mental wellbeing trade off. So, then how do you prefer to engage with your coworkers? Would that be remote, in person or hybrid?

Speaker 2: Hybrid? I mean, I don't believe in a binary answer to this. It needs to be achieved in balance. I think in an ideal world or what I've really enjoyed in the past year or the in person part of it is fundamental and great. I thoroughly enjoy it. It creates and sustains longer bonds. It allows the concept of breaking bread to be unlocked which fosters trust.

Speaker 1: We're actually getting into that. Give me one more question and then I think this feed nicely into the scenarios I'll walk you through. But then should that be the same for how you can age with clients> It's a hybrid because you can't give a linear answer to it?

Speaker 2: Yeah. it's a hybrid. I mean, everything's a hybrid with everything needs to be a hybrid within balance.

Speaker 1: Perfect. So then in this next phase, I'm actually going to walk you through seven scenarios that we encounter with our clients. So what I'm really looking for is just how you ideally structure a situation like that. Like, are you meeting with them in person or remote and what is the goal for you? In the first one you're meeting a potential client and would like to explore if there's an opportunity for a new project. How would you meet with them? Would it be an email, would it be in person?

Speaker 2: Ideally or?

Speaker 1: Yes, ideally.

Speaker 2: If I've never met them before, my first reach out would be an email. My first directional interaction would probably be a phone call. I'm not presumptuous enough to assume that I can have a first meeting with someone in person. I think I believe in the move up, kind of the step up of the communications process, because it is the most respectful of people's time.

Speaker 1: Perfect. So then you met with this person and / or you talked to them and you're now working on a proposal for them. Who's your audience, and what do you do to successfully close to the deal?

Speaker 2: Within the physical virtual setting? Or how do you mean that?

Speaker 1: The setting, but then also just like you had touched on, on building trust. I personally believe that this is an important phase to build trust so that they also are more willing to listen to you and to be willing to invest in you. So how would you achieve that?

Speaker 2: Got it. Ideally, once you get to the proposal phase, you've obviously clarified scope, you've price qualified. Ideally that discussion would be done in person with both my clients and the user buyer would be the person that you would be interacting with as well as the financial buyer, the person who would approve. The reason I would want at least those two stakeholders involved is for one conceptual approval and two financial approval to get the ball rolling, as opposed to having to create a backlog of discussions to get started.

Speaker 1: Okay. And then the actual kickoff meeting, how do you structure that?

Speaker 2: That would also preferably be done in person with a pre-identified list of critical stakeholders, including both the user buyer and whoever they feel is critical to the program from a buying perspective. So who needs to be introduced to this program day one, who are we dependent on for its success, and who are most likely to benefit from it all. Those are the kind of three stakeholders I would prioritize being in there, within reason, obviously, as well as the critical members of my team. I'd like to foster a culture of transparency and openness. So I'd like anyone who is participating in the project to be a part of these discussions. So they can themselves, especially when in person, established rapport in a quick way.

Speaker 1: Perfect. And how do you structure an active project? Are you checking in with your client? Are you remote? What do you think would be your ideal setup?

Speaker 2: Yeah. In kind of the post COVID world, think that the working team being together in person works best. I think the client touch points, at least if I take a project duration, at least the beginning, an interim checkpoint and a final readout should be in person. I think

the interviews with the stakeholders throughout a project, or the interaction points with different dependent stakeholders can be done virtual. They were participants in the first sessions, if they are critical stakeholders. And then an in person meeting would be of best courtesy. I think that the regular touchpoints provide status updates with my client could be done virtual. I should be able to convey this to the client and I should do it early and often that it's more about having my team work together in person creates the best benefit to give my client the outcome that they deserve and they have paid for. Even if it's at my expense, it's not theirs obviously. And making sure that from a client engagement perspective, I will promote continuous communication with them through both structured and unstructured checkpoints but those can be done virtual. That's how I've seen it done best.

Speaker 1: This is perfect. And I think you touched on my next question, which is for important milestones or the end of an engagement, it sounds like you would want to meet in person?

Speaker 2: Absolutely. I think this model also has some indirect impacts I think actually, we overlook number one, client person or services and they have a day job, being proximal to them physically, we have to be mindful of the distraction. I mean, if they have to kind of babysit us to an extent, that should never be the case. Second, the team working together at our expense, even at our facility, fosters better collaborative relationships between coworkers which thus creates better outputs for our clients and creates a better environment for our own people. And so those two things I think we sometimes forget, it's easier for upskilling. It's easier for relationship building. It's easier for networking and, and it creates just a better work product.

Speaker 1: Okay. And then if you were to ask for a follow-up project, how would you communicate that with your client?

Speaker 2: You always want to communicate the potential for follow about two thirds to three quarters of the way through the project. You never want to leave it to the end because it could create a gap in delivery that and thus risk having continuity in the team, especially if the team is already built and the client trust them. So about two thirds to three quarters of the way in between the internal and final readout, you want to have informal discussions around how the client sees the next steps evolving based on what they've learned to date. And then you want to ensure that in your regular checkpoints with the client, you're not only talking about then status, but you shift to a balance of talking about status and then next steps. And then the next discussion you first speak about vision, basically. What do you think is next, what do you think after we're done? What do you want to get accomplished? If it's a strategy project, you speak about execution. If it's an execution process, you speak about the next phase of execution. So you first ki get that high level perspective from the client, based on that you iterate collective, jointly iterate on the scope of what that next engagement could be. And the inputs to iterate on that scope could be above funding, could be informed by the current phase of the project based on what the next milestones are. Or it could be numerous zones, but primarily those subjects or areas to explore further. And then towards kind of the 90% mark of the project, or 80% mark of the project, you want to start the discussions around price qualification, and actually putting together a formal proposal to ensure that by the time you're doing a final readout, you bridge into the next phase of work seamlessly without contractual hiccups that could lead to the team having either downtime or you having to really tweak sources. And you are transparent with your client around the urgency. They

need urgency to speed things up on that account, because you do want to tell them that, “Hey, in order for me to keep the team around, if you are interested in us continuing, we need to have these discussions at this moment in time”.

Speaker 1: Perfect. So then outside of these engagements, how do you foster your client relationships, when you're not in a contractual agreement?

Speaker 2: Got it. You'd like to do a couple that are best practices. One is a personal one. Your clients are still cubic. They're not robots. So if you have a good rapport and relationship with them, foster it, continue it. One of my clients, he and I are good friends. We text each other. We text each other constantly about just stuff we see on the news where we have commonality first. And we just use that consistent informal communication to find, to explore and discover potential areas where you can actually have a formal checkpoint. These formal checkpoints could be on, “Hey, what are you up to”, or these checkpoints could be informal. And, Hey, what are you up to, and trading those notes. These formal checkpoints could evolve into, Hey, I discovered, learned, delivered this new function or capability that I think you'd be interested in. The formal checkpoints could be also free consulting in the sense that you tell them, you give them a look around consideration of where the industry's heading. Hey, based on this partner or this technology, or this announcement, or this client engagement, I'm giving you this piece, this nugget of information about things you should be thinking about to meet your overall business checks. Obviously, it is also best practice for us to know what the business of our clients, not as individuals but as corporations should always be keen to understand their place in the market, where they're going, where they're falling, where they're failing and where they're succeeding. And that doesn't need to be reading reports. But so that's kind of another thing. That's kind of the personal and the business angle. So I think I veered off

structure, but that's how I would do it. Depending, some clients are really good. They, once they have a good team, they're really good at making sure that good team is always communicating with each other. The same client I mentioned, we have a group chat with all of us who are on the project, and we just shoot the for lack of a better term. We all like text each other personal things. That's so awesome because it effectively removes the barriers for me to reach out to my clients specifically about something that's business. Those are kind of the two ongoing things. The third thing that I think is important and why a lot of our leaders invest in, is to attend and reach out to these people when there is an upcoming industry event. They are an opportunity in a safe and external, in an informal place to have a good business discussion. So what do you do? You going to an event. You're going to talk about something in an event and then use either informal channels like LinkedIn to broadcast that hoping your client will see, or you formally reach out and ask him, Hey, are you attending? Would you like to sync up? Would you like to meet up? Haven't seen you in a long time, and that's kind of the third approach.

Speaker 1: This is perfect. Thank you. Do you think there are relevant situations that you encounter with your clients or that have not touched on?

Speaker 2: The negative parts, like having to tell your clients bad news. I'm going through a situation, an entire area, that I don't think we talk about or prepare a lot. But what happens when your client asks you to do something for them and anytime your client, anytime in consulting, a client asks for something, they're asking you to validate a hypothesis, Very few times you get card block. Sometimes those hypotheses are wrong. Sometimes what the outcome that they're expecting is not the outcome that data produces. So how do you manage a situation where what you're telling them is not what they want to hear. And we don't train our people well enough to do that. We don't train our people well

enough to once they cease site of potential conflict and the hypothesis versus the outcome. We don't train our people to ask clarifying questions early and often to ensure that the expectation is molded to what the outcome is going to produce, rather than it be a surprise. And I don't think we train our people well enough to use the consistent channels of communication, to be unbiased in the information that is shared. So, as an example, there must be a balance achieved when you're doing project management. Never showing reds because showing red status means that there is literally something broken, so I agree with never showing red. I agree with every yellow, especially when you're talking to a client or an executive. When you're showing status, every yellow needs to either already have been solved or have a mitigation strategy, or already have a path to resolution. So essentially, I don't agree in just telling an executive that something's broken, but not having an answer to how to break it or not having already made requests on how they can support you to break it. But at the same time, if you know that you're driving into an area where the outcome is not going to match expectation, then you need to use those statuses. The status should be marked to progress, towards the outcome. But if the outcome itself in content is not matching expectation, you need to use those regular touch points to instill a narrative for the client to understand that they might hear something they don't want to and you have to be data driven. I've had it in two projects, and I just coached someone on a project where a client expects the customer to want something, but the customer interviews are resulting in something else, and they are trying to convey that to the client, but the client doesn't get it. Doesn't understand why. And I literally told the team, I said, "guys, you need to literally put a slide in front of it with quotes from the transcripts of the interviews, because they can argue with you all day long what the customer is wanting from them." Something like an apple versus an orange,

but they can never argue with explicit excerpts from an interview, they cannot argue with data. They can argue with you, but they can't argue with the data. The key is that we meet our clients where they are at and then going forward that we are more flexible and hybrid in our approach so that we can really be more targeted when we get together and use it to build trust and have a value add in person meeting. Would you agree with that? Everything needs to start with balance, balance for the employee, balance for the client, balance for the work. Second in person will always foster quicker establishing rapport and trust. It's not a detriment to not to be virtual. I think, it's just a question of balance, honestly. For everybody. It respects everybody the most when you try to achieve balance.

Speaker 1: This was perfect. Thank you so very much.

### **Appendix B23: Director 3**

Date: Melissa B

Speaker 1: I'm connecting these interviews for my DBA research. I would to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: I do.

Speaker 1: The transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: So in the first section we are just talking about your experiences. So how long have you worked in consulting?

Speaker 2: I've been in consulting for 18 years.

Speaker 1: And how many of those years have you worked in person and how many remote?

Speaker 2: I have worked virtually almost my entire career, but I've traveled up until COVID a couple times a week in person with clients or with my teams.

Speaker 1: That makes sense. And then have you detected any changes in yourself or new habits that you've developed since primarily working from home?

Speaker 2: I mean in person I think is always easiest. However, because I've always worked virtually, I think it's just the ability to actually create really authentic connection with people through virtual channels. I feel that's something I've done even before COVID because I was always there, but I would reinforce that with a follow up. I would never sell on a call for example, and now I do. I have to figure that out. So I think my shift of the productive nature of the outcome I'm searching for is much more important over the last couple years than it was before, because I could have done that in person.

Speaker 1: This is perfect. So then when you think of engaging with coworkers, would you prefer that to be in person or remote hybrid?

Speaker 2: Yes, it's intentional. So, if you want stories, I can share a good story too, but I think there's an intention of it. So, just as an example, I was with a CFO and a growth officer with one of our largest clients in the West and they took a dinner with us. He was sharing that everything is about the intention of in person. Conferences in industry used to be an event everybody went, yet he said the outcome of that was never the same as having a dinner with somebody. And the ability to cut that in 50% is, in his eyes, that's his new go forward. So the intention of a face to face. So same thing with me, the intention of a face to face, I'm building a new relationship I need to harness trust with or I am selling and pitching something the in between of showing up in an office is no longer important to me.

Speaker 1: Got it. Well, we're actually breaking that down even more in this next section. I'm going to walk you through seven different scenarios of situations we encounter with our clients and would like to hear how you would ideally respond to the situation. So in the first one

you're meeting a potential client and would like to explore if there's an opportunity for a new project. How would you engage with someone like that?

Speaker 2: Yeah, so one is, I always, if I don't have an invitation yet to that person and they're a new leader, I find a way that's a warm connection in my network for an introduction. I did that yesterday, the chief sustainability officer of a company, a friend of mine knows him. He did an introduction. I now have an introduction to him. That can be done on the phone. I think people are going to want to know they want to personally spend time with you before they actually meet you and then you have a hook and then after that, it's create a face to face interaction. Then that will solidify the relationship. I want to work with them, there's something meaningful I can get out of that. And then you create more of a concrete foundation of that relationship with a follow up. I very rarely do cold call outreaches because it doesn't work.

Speaker 1: That makes sense. And then you're working on a proposal for this person. Who's your target audience and what do you do to successfully close the deal?

Speaker 2: So if I'm working on a proposal for a new leader, one is I want to make sure I'm talking to the buyer, who the actual buyer is. Sometimes the person you're doing a proposal for is just the conduit and so in order to spend my time and my team's time on something, they find out who the real buyer is and whether or not we have a relationship. And if it's something we want to invest our time in, and then if we do have a relationship and we have an audience, then orals or our report outs are always going to need to include that person. So, and that is much more virtual than it ever was. We always did those orals face to face. I'd still say that would be the preference because a lot of times if you respond to an RFP and don't do that, you're not going to win. People, they don't turn over lots of large sums of money to people that they meet on the phone.

Speaker 1: I agree. Well, in this situation you actually won this project, of course, and you're kicking it off. Who do you have attending the kickoff and how do you structure that meeting?

Speaker 2: I think for a kickoff, it's always important to hear from the client first. So even if Accenture is coming in and shaping the discussion when we do a kickoff, you always want to have the senior most person on the client side share why this is a priority and what matters and why people need to spend time on this versus the 10 other things they need to do. So I think we will play a back bone support, even though we're driving the objectives of the project. I'd say for a kickoff, I feel that is going to be less and less in person because kickoffs require a lot of different people and an hour kickoff meeting doesn't justify spending money. But you need to have it video and you have to have interaction. And I think kickoffs can lead into deep dive sessions that I think should be more in person. When you're actually doing solutioning and creating change management and buying it in transformation, that's better in person.

Speaker 1: Well, that's pretty much the next question. So during an active project, how do you engage with your client?

Speaker 2: I'd say one is building a plan and a roadmap of where the key milestones of events were in person is required. So now we've obviously had to deal with virtual for the last couple years, but in projects that we have now, when we say, okay, there's a key milestone where we need to have a face to face meeting in Atlanta on this day, at least for planning really, in advance. And we're making sure that we use our time. So I think what's really important is how are you using everyone's time to the most efficient and productive way possible. And you're planning for those things versus just Accenture people sitting in an office Monday through Thursday, just having to be there that is no longer going to happen, both on the consulting side and our client side. So I think it's just really good productive

planning that actually demonstrates the dynamics of how your teams engage. And one thing that we also, in almost every presentation have now, is how do you work with an Accenture in a virtual environment? And does that look like and what are the tools we're bringing? And we incorporate those different activities throughout the course of a project. And so you want to keep people motivated and engaged.

Speaker 1: This is perfect. So then do you think it's different during important milestones or the end of an engagement, would that be in person again, or is that also virtual and you just use different technologies? Is there no difference at all?

Speaker 2: I think similar the kickoff one thing that is really important in the beginning of a project is that it's not about the SOW and the details, because actually nobody reads those besides the people that have to sign off their names. It is about at the end of this, what is it you're hoping to accomplish? When you end it, it's going to be a lot more about the art of the possibility and that Accenture didn't just do good work. They actually accelerated and gave me more than I asked and again, if you can do that in person, great. If you built trust and influence through the course of your project, I think virtual is fine. I think that we tend one of the things that we starting to do, that we didn't do before, is what type of innovation can we bring into our projects and what type of perspectives would be helpful. It doesn't cost money, but we can provide you outside of just the project you're paying us for. This is something that's really shifted for me over the past. We're talking a different language to our clients about how to put sprinkles on top, even if they don't pay for it because it's just the way we differentiate against other competitors.

Speaker 1: That makes sense. So then if you believe that there's potential for a follow up project, how do you communicate that?

Speaker 2: So you always sell by not selling, because not one client ever takes that serious. It's about always paying attention to the problems that they have. And through the projects, if you're not you as a partner, not always the ears to the ground, you have to help coach those that are closest to the problem, bringing up the opportunities and creating a continuous improvement dialogue around what are the other things that we need to be doing? That's more than just doing this basic delivery, and that's called pull through. And so when you don't have to sell it, you've already sold. It's not about selling again. It's about creating a funnel of opportunity because now you have ears to the ground, you have ways to what if you could do this? And a lot of your relationships just continue to foster and you're no longer in a competitive bid situation, you're in a soul source situation. They trust you, how to deliver their business, you're bringing them ideas. You're going to work with them, put skin in the game. Why would they go with anybody else? That's gotcha. How we approach our projects.

Speaker 1: Perfect. Thank you. And then final question. Outside of engagement, how do you foster existing client relationships?

Speaker 2: I feel I'm really good at this. I've had three client calls already today and I have one after this. So you have to be fearless and just managing your network. And so always focusing on where my past job has literally created this avenue of huge networks and I am not afraid to reach out. A friend of mine is a chief security officer for one of the biggest retail pharmacy companies in the states. I went to college with him. So somebody said, Melissa, do you know him? Oh yeah, I know all about him. I know stories from when he was 20 years old. So I think that's a way in which I outreach and I'm going to create a personal authentic connection but maybe there's something there. So I always lead with a, you and I have a relationship and I'm going to always keep that as the core, but if something comes

up where there's a value outside of our personal connection, he or she now knows they have a line into me. And I just did that with somebody before we joined. The way I manage it is I always outreach and check in how people are doing. I get time on their calendar. I copy their EA. So I actually just build time in and don't even ask for permission. They cancel it, I give it three tries and I keep going back and if it doesn't work, you try another angle. That's why some people kind of sit on the stands and expect clients to follow on their lap and others manage and work. And that has been effective for me.

Speaker 1: Do you think the tools that you use during this phase are different? So I know you were still talking about you video calls, but is it also text messages? Is it dinners?

Speaker 2: I will do, yes. So where I'm not in the office anymore, my clients are all over the country, so I am not local and I have to. Before I could have been, but the dynamic is I can kind of be anywhere. And so the way that I communicate is very fast and impactful. I dropped a note this morning, I put in the header, I said, I need five minutes this afternoon. If I asked for 30 minutes on a topic, he would've said, okay in a month, I can get with you. So I changed into a Twitter mindset of, how do I talk to my clients in a way that just knows, I got something quick I want to share with you. It's a good question that may be helpful for you and me and I only need five minutes. So that has shifted. And yes, I text. There are some people who are on all the time and I text them. If I emailed them, it goes to a black hole or some people, they may prefer to pick up the phone and just hear a friendly voice. You, that's got to be, you got to turn that up a notch. I mean, ultimately though, I've got a few dinners with clients, those are going to be much more meaningful in the long run. I'm going to do dinners because people want to get out. They want to talk with people and I don't need to have a dinner and then a meeting with them in person, a dinner is fine. It creates a platform and a discussion and it creates some conversation that is two-

way. And hopefully that's the only personal interaction you need to have in the course of that short term period.

Speaker 1: This was wonderful. Thank you. Do you think there are other relevant situations that you encountered with clients that I did not touch on?

Speaker 2: I think one of the things that are really important to clients is how do they consume information. Because everything is virtual and the access to things is so much more . Clients are getting bombarded by every partner, even I am on LinkedIn. I'm not going to build a relationship with the CIO of the company and they're reaching out to me. So a part of the way that you need to communicate is share information about the power of what you can offer a client that has shifted? So it's understanding here is my problem and it's not dumping a bunch of point of views or stage zero decks on them. It's about reshaping the information you're sharing. So when you think about it, we need to have a point of view; people always say that and we need to have a point of view. We need to be able to show this tool, we've had to really refine what's in it for them. And that has completely leaned out over the last couple years, because everything is virtual and everything is being pumped at them. So the art and science of communicating the what's in it for them based on what your company can provide them has to be much more the headliner or the title of a book. And I feel that has completely shifted in the last couple of years.

Speaker 1: Perfect. Thank you. We're going to shift focus a little bit and talk about the future of work. So how do you foresee projects to be structured going forward? It kind of sounded like it's almost more of an in-person, on demand, instead of always being present or always being home. Is that's a true statement?

Speaker 2: Yes it is. So I almost assume that the basic core is we don't travel and then we build on that. We bolt it on versus the inverse of we are going to travel and you have to pay 15%.

That's not the new, the new baseline has shifted. So the baseline now has to be the additive of why we need to work differently. And what comes out of working, that's better than just doing it virtually.

Speaker 1: Got it. And then do you think that will affect how we use our own buildings, too? Our offices and innovation hubs and all our infrastructure?

Speaker 2: I'm in the Denver office and I'm on the Denver leadership committee and we've talked about getting people in the office and just having to show up is not the way of motivation for our own associates. It's what is going to draw people to the office and what differentiates us. And it's about our innovation studios and our hubs. And it's about coming up with a lot of ideas that could take 10 weeks, quickly, do them in one day. So you have to make your environment much more conducive to problem solving and solutioning versus just having a nice office. People want to go to where clients are, that's not the way that we're thinking about our future office in Denver.

Speaker 1: Got it. And then, is there anything we need to continue to do to strengthen our company culture? Are we going back to Christmas parties, gift sending?

Speaker 2: That's a good point. So I lead our strategy and consulting practice in Denver. And we are meeting tomorrow for the first time in months virtually, but one of the things we're going to talk about is what do people want to do more of? And I think people are so over let's have a comedy, or let's do a happy hour virtually. I feel there is a need for us to still continue to have those. And we focus on that. We just need to let the, you can only have 10 people at an event type of thing go away so that we can start bringing people in. I don't think that's ever going to go away.

Speaker 1: I think, well a hypothesis, a comment I have heard is also the question on, is it still just individuals that works for a company, or are we also including the family now that everyone has seen everyone's dogs and kids and whoever else through the screen.

Speaker 2: Yeah. And I feel because the way that we work now one of the things, I remember a COO of a company I worked at four years ago. I was pregnant and I was on, I had my third kid and she was like, how have you done this in your career? I separated work from home and home from work. And I was sitting there going, okay, I'm not sure I buy into that. And I totally don't buy into that now. I feel the whole focus of the last two years is that our work professionally and our personal lives have so commingled when my kid comes in and kisses me on the cheek or a baby's crying or dogs barking, intolerance of that was so high before.

Speaker 2: And it was never the authentic way I live my life. Now I can live my life in a way that's connected to work. And that allows me to have a lot more motivation to work. So I feel like I want my family to be included, or I want things to be more connected that have been separate. So I totally agree with that. And I think that the companies that can figure out how to work in that environment, blend it and be yourself, and I think Accenture's really good at that, I think the more they're going to have retention and engagement from their people.

Speaker 1: Then two quick questions. What's the number one advice that you'd give in person managing a client engagement?

Speaker 2: I'd say personally know what motivates them as an individual and how you work with them. I mean, I do profile people before I meet with them and I have a tool, we have a tool. I know the kind of person and how they communicate and how you deliver that in advance. That is absolutely the thing that is going to say, oh Melissa engaged with me

differently. I like her or I want to work with that team. Not only because they can deliver. So I think that's my advice, it's get to know them personally, professionally, how they work and that will pay off when you start engaging with them further.

Speaker 1: And then do you have any last pieces of advice or thoughts about anything we've talked about that you would like to share?

Speaker 2: I don't think so. I think we covered it.

Speaker 1: Thank you very much.

#### **Appendix B24: Director 4**

Date: Sarah H.

Speaker 1: I am conducting these interviews for my DBA research and would to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes. Do you consent to be recorded?

Speaker 2: Oh God, you have to record my voice.

Speaker 1: Well, the transcript will be made anonymous and attached to the final project, is that okay?

Speaker 2: Okay. That's fine.

Speaker 1: Perfect. So how long have you worked in consulting?

Speaker 2: I started in June of 2003. Over 18 years.

Speaker 1: How many of those years have you worked in person? How many remote?

Speaker 2: It's an interesting question. And maybe this is a nuance that I don't know if that plays into what you're thinking or not, but I was always partially remote. So if you think about consulting, let's talk about the true sense. So pre-pandemic, I guess you could say it was always in person, right?

Speaker 1: Well, a hybrid, right?

Speaker 2: Yes, it's always a hybrid because in consulting, I'm not with the client a 100% of the time. So even if I was doing the Monday, Thursday travel Fridays would generally be remote. So, from a client perspective, it was always a hybrid, but majority in person; 80% in person. But in terms of the Accenture colleague and working team that always almost stayed remote, even pre-pandemic. So think about it, a part of this network practice as an example, I don't see them in person often at all. In fact, many of my colleagues I haven't even met in person before.

Speaker 1: Do you have a preferred way? Now that you've experienced it all from having always been remote with Accenture colleagues, but then sometimes onsite with clients, do you have a generally preferred way of engaging with coworkers and clients?

Speaker 2: I think, and maybe it's because I've always worked in this mode, I'm a bit biased. I actually do believe in a hybrid model. I think it's very difficult to be a 100% remote and a 100% purely digital, because at the end of the day, consulting is a very heavily relationship based, trust-based model. It's people. We have some assets and things, but at the end of the day, we're a people business and not having any in person kind of interaction, it is definitely a challenge. And I don't think that that doesn't mean we cannot run our business, but it might mean it takes us longer to build trust or to win that deal. Or maybe you have to make more attempts to win a certain deal. Or we may have to go after more RFPs instead of soul source deals because they don't know us as well and they're more open to a broader competition. So I think we will run our business, but maybe it's harder for us to win deals more quickly or things like that.

Speaker 1: Yes, let's actually jump into the next section where we are breaking that out. So I'm going to walk you through seven different scenarios of situations that we encounter with our clients. And it's really more about how you would ideally respond to the situation, not just

with current COVID constraints. But in an ideal world, if you're meeting a new potential client, how do you engage with them? Is it an email, is it a lunch, is it a dinner, what's the best setup for a new person?

Speaker 2: And you said regardless of pandemic or not pandemic, correct? It always depends. I think it depends on how you're reaching out to a new client, meaning is it a cold call? You have no relationship with the client, you don't know anyone else that knows them that can do that introduction. And it purely is a true cold call. I think generally that will be via email or some sort of I don't know, I am not an active LinkedIn person, but maybe it's through some sort of digital interaction. Whether it's an email or a message but ideally, it's someone introducing you, making that connection for you. And so you can do that even as a quick intro meeting would be ideal. So that you can at least put faces to each other.

Speaker 1: Got it.

Speaker 2: Okay. But yeah, I think it's more around approach versus preference than I think you kind of need different arsenals, depending on your real relationship, or lack of, with that client.

Speaker 1: This is a great differentiation. So I do think we can move on to the second one though. So if you're working on a proposal, how do you successfully close the deal? Do you have anything like regular checkups? Are you meeting with them in between? Is there anything that works really well. And then also if you wanted to go get into it, what are you trying to achieve at this point? I'm guessing it would be building trust, but maybe I'm wrong.

Speaker 2: So again, it depends what type of proposal is it. Is it proactive or is it reactive and reactive meaning maybe it's an RFP. Proactive, maybe it's the kind of relationship that you already know and established and you're trying to pitch something on the backs of something you're already doing or whatever it is. So I think I'll use the word depends again. So in the proactive, different scenario, maybe you already have trust with the client. So in those

cases, it might not be about necessarily about building trust with that client. Maybe it's building trust in the solution or what you're proposing. I know you Lina because you work with me and I'm a client of yours, but I need to know and understand what you're proposing. So maybe I'll kind of tease out that nuance, if it's reactive, it's an RFP, you have no idea who this client is. We don't have any relationship with them, but yes, there's definitely very, very much the need to not only establish trust, but establish credibility. Because they don't know you, you don't know them. So trust and credibility becomes important.

Speaker 1: Perfect. And then of course you won this RFP, how do you start it? How do you kick-off a new project and what structure would you have?

Speaker 2: Okay. So good timing because I just got another RFP.

Speaker 1: Perfect.

Speaker 2: So first thing we do is qualify it. We try to identify, obviously we've read it, we get the general gist and scope of the RFP and we need to identify SMEs that understand that space. So, and we need to have the qualification meeting.

Speaker 1: So you already won it, right? So your project team is set, you won the deal. So how do you really get it started? What does your kick up look?

Speaker 2: Oh, okay. Sorry. Sorry. You won a deal. How do we get it to? Okay, always the biggest challenges are finding the right resources to deliver that program. So if you've assumed we've already identified the people, kind of going back to that trust and building client relationship, we need to identify who is your lead. Who is your person that's going to both deliver the program, but is going to own the client relationship. Sometimes they're one in the same people, sometimes they're not. Depending on how big the program is, how complex it is, is it technical not technical, you need to establish the roles of the program.

What are they going to be responsible for? We have established roles, a QA director and a delivery lead and the account, the client sponsor. So you have these traditional roles and there's a reason we have them, we need to make sure that we had to understand the client expectations, who is going to own that. Who is going to understand client expectations and makes sure we're meeting those expectations, again maybe it's one in the same. Sometimes they're not, sometimes they are in terms of the same person.

Speaker 1: Got it. And then, while you are actively working on the project, how do you engage with your client? Do you think there's any value to set cadences? Do you think online is just fine? Do you think you need to meet in person?

Speaker 2: Definitely cadence is needed, touch points are definitely needed. And I would say are required. The frequency obviously is up to the discretion of the program, but I do think touch points, I would say required. Is the in person client meeting needed? I think it depends on the type of meeting, if there's status meetings and you just want to know the progress, that can be online. I think we can all agree. If we're trying to have a working session, a brainstorming or war room, we've really hit a problem and we just really need active engagement, that's really where the in person helps. Not only just from enough efficiency perspective and productivity, because you're actively in the room and you're engaged, but I think those are the moments where you also build the bond with your clients. Whether it's, we're brainstorming, we're coming up with cool ideas and thinking forward or we're really in the trenches digging in on this problem and we're trying to get it fixed and burning the midnight oil, you know what I mean? So I think it goes back to types of meetings. Some are totally fine to have online but I do think while we attempt to bridge the current pandemic issue and have these other meetings also online, I think they're always best to have in person, if feasible.

Speaker 1: Got it. So I think this is almost more important milestones that you were referencing that should be in person, that's a making key decisions, it's working sessions. Do you think it's the same for the end of an engagement? Should you also present in person or does it not matter?

Speaker 2: At the end of an engagement? I don't know if it necessarily needs to be in person, I guess. Are you thinking of an end of meeting as in you completed our project? We're closing it, is that what you're thinking?

Speaker 1: Yes, a final readout and then my follow up question is going to be, if you are trying to sell a next phase, a follow up project, how do you communicate that? So I think these two questions are very close to related oftentimes. Right?

Speaker 2: Yeah. Well ideally you're already having follow up conversations even before it ends. But look, I think if there's an opportunity, well, it's actually kind of you actually triggered a thought at the beginning. Oral presentations when we're trying to sell a deal used to always be in person, now they're almost completely remote. I know I'm kind of digressing a bit but I do think when you're first trying to sell, it is important to try to do it in person. The last two RFPs I just had, we did orals remotely via video conference and it's a very different dynamic. You can't see body language, you can't see how people are reacting as well. It's a very different experience and there's a reason why those were in person, traditionally. So yeah I never really thought about the end of a project. For me, I think it's more not necessarily about the readout and the project, but more of a milestone celebration. Those would typically be in person with the client, especially if it was a big program and we finally crossed the finish line. You want to celebrate that moment with your client. And we would usually do that as some sort of event and I think that's very important to maintain. Again, going back to relationship and building a longer lasting

relationship with the client and it doesn't just feel transactional, here's the program, we finished it. Thank you for your money. Have a good day. We ultimately want to create a relationship that is more valuable to us in the long run. And so maybe the readout can be in person or doesn't need to be in person, but historically we've always celebrated those moments.

Speaker 1: Yeah. You're talking about building oxytocin. That that makes a lot of sense. And you're actually the first one to mention the celebration so I'll definitely include that. If you think of fostering existing client relationships outside of engagement, do you have any go-to for that? Do you meet them for coffee? Is there a text message, does it not change at all from the structured Teams meetings or in person workshops?

Speaker 2: I'm sorry. Could you ask the question one more time?

Speaker 1: So existing client relationships that you have when you're not on an active project with someone, so you don't have a scheduled whatever, every Monday you're meeting them anyway, how do you keep being engaged?

Speaker 2: I will say it's not easy, but it is something we should be doing because you're always kind of top of mind focused on your active engagement. But we want to keep that relationship. You don't want it to go cold. There are actually a number of ways to do that. It depends on how close your relationship is with that individual. If it is someone that you really did know, and you were already texting and comfortable in that, definitely you want to maintain that level of informality because that's hard to get to. To get to a point where you're just texting a client is isn't always easy to come by, but what I kind of refer to is social media and LinkedIn. One way to stay present with them is to react to a post or shoot them something that might be relevant to them, a post or you what I mean? There are ways to keep that warm without it being, to your point of structured weekly meeting

them. For instance, we have a woman's event that Accenture hosts coming up. We want to invite all of our clients to that, whether they're current or past. So I think there's lots of ways to maintain reach out and maintain some level of interaction with them outside of a day to day program. We look for different avenues to find ways to keep reaching out to them.

Speaker 1: This is perfect.

Speaker 2: Or to your point, Hey, I'm in town, want to catch a coffee? You try to find those moments where you can connect back to them. And it has to be organic. I don't like it to be too salesy. Hey, haven't talked to you, what are you up to? Can we talk about what your needs are? I try to find an excuse, Hey, I'm in the city you're in, happen to be there. It would be great to connect or are you going to be at this conference? You know what I mean? You try to look for moments of where there is a natural connection and use that to do some sort of reach out or a quick, Hey, thought you might find this article interesting or we've got this great woman's event, I know that was always something you're passionate about, I would like to invite you to that.

Speaker 1: A lot of people were talking about bringing humanity back into it, too. So I think organic and making sure you are related to that person and figuring out the commonalities is kind of what it sounds like. Would you agree?

Speaker 2: Yeah, definitely. Well, at least that's my approach. You want to find those connection, commonality points in an organic way. At least that's my style. I'm always not a fan of just straight cold calling.

Speaker 1: That makes sense. This was very, very helpful. Thank you.

## **Appendix B25: Director 5**

Date: Susy

Speaker 1: I'm conducting these interviews for my DBA research. I would like to ask you a few questions about your experiences with varying workplace settings. The interview will last about 30 minutes you consent to be recorded.

Speaker 2: Yes.

Speaker 1: Okay. And then the transcript will be made anonymous and attached to the final project. Is that okay?

Speaker 2: Yes.

Speaker 1: Perfect. So then I will walk you through seven scenarios. In the first one you're meeting a potential client and would like explore if there's an opportunity for a new project, who's your client and how do you engage with them?

Speaker 2: So my client might be someone at my account, I would set up a meeting using their Citrix system versus our Teams system. I would do as much research ahead of time on their professional and personal life that I could find through my contacts and through what's available online through like LinkedIn or whatever. I would try to do as much research as I could on what their challenges might be and set up for success and then open the conversation with a little bit about myself and maybe share kind of what I'm hoping to get out of the conversation, but also ask them for what they would want. Is that kind of what you're looking for?

Speaker 1: Yeah, that's perfect. And so would the first meeting would actually be a call?

Speaker 2: Well, I thought the purpose of this was everything had to be virtual.

Speaker 1: No, it's an ideal situation. However, you would ideally structure this meeting. So outside of COVID.

Speaker 2: Ideally, I would do it in person wherever they're working. So ideally if they're in the office, I'm in the office or I would maybe try to do it at like a coffee shop to be a little more informal.

Speaker 1: Perfect. And then now you're working on a proposal for this client. What do you do to successfully close the deal? Do you have like meetings with them in between? Is there any kind of engagement that you have with the client while you are creating the proposal?

Speaker 2: So in an ideal scenario, yes, I would be doing a bit designing it with them. So I would get their initial request and I would come back to them before we submit the proposal where we have a number of iterations where I can get their feedback and adjust it. Show them something, review it with them and adjust kind of multiple times to make sure that they feel like we're meeting their needs and that they've had an input into the process.

Speaker 1: Perfect. And then of course you won this project, so how would you structure a kick-off?

Speaker 2: So ideally we would do it in person, probably over the course of a couple of hours where we would get everyone that we needed, who was going to play a critical role in the project, and some key sponsorships together in the room. We would do a bit of visioning, kind of art of the possible, to get people out of their day to day. I'd say dress informal to have people feel comfortable. We would do some icebreakers, some creative work shopping, do a bit of team building, happy hour, expectations and ways of working and build some commitments around that and then go from there.

Speaker 1: Okay. And then during an active engagement, how do you engage with your client? Do you have any stand up calls? Do you have in person check-ins in between? Do you have dinners, anything like that?

Speaker 2: Yeah, I think the formal governance is really important and informal. So formal governance, like status reports, weekly meetings, escalation logs, your formal PMO

governance processes. And then I do think I would have informal check-ins both remotely and in person on an ongoing basis. I would hopefully have an ongoing virtual dialogue. You do whatever their online tools are to be checking in with them, seeing how things are going so that we're having a regular open communication so that we could have conversations outside of just the formal ones. And then I think dinners or happy hours or coffees, chances where we can actually just go to lunch where we can build a little rapport outside of a very formal setting.

Speaker 1: This is perfect. And then if you think of important milestones or the end of the engagement, how do you present your finding?

Speaker 2: Sorry, say that again.

Speaker 1: How do you present your findings either for important milestones or the end of an engagement? Are you all in a conference room and you have your screen up or are you trying to make it a little more interactive? Are you demoing something, if possible?

Speaker 2: I think so as I would say we would want to show findings as we go. The last thing that you ever want to do or that I would say I try to avoid is surprises. So I would want to make sure that the findings are things that we are documenting, whether it's through a formal governance process, be discussing it in meetings, in whatever reports or documents we're maintaining. And then as we get close to the end of the project where we have our final deliverables, I would want to start creating the draft of those early and similar to the proposal. Reviewing it and shaping it with the client. So that one, there's no surprises, two, they have input and three, they feel like they're part of the solution or part of the final outcome and that they have some ownership for it.

Speaker 1: Awesome. And then if you believe that there's potential for a follow up project or a phase two, how do you communicate that? I mean, it sounds like you really don't want to

surprise the client. So I'm assuming you would start that conversation earlier than the final readout.

Speaker 2: Yeah. I would start that conversation earlier and generally I approach it from a "here's the work that needs to happen" versus a, "and here's the project that you want to sell to Accenture" and work it from shaping of the type of work and the outcomes that they're going to look for. And then back into where they might play a role where they could help. And then depending on how much buy-in we have for us to do the next phase of work, I would start teeing that up early in parallel while we're still developing on the first phase of work.

Speaker 1: Got it. And outside of engagements, so if you don't have an active project going on that requires you to meet with the client every two weeks or so, how do you foster your existing relationships? How do you make sure that you still talk to them or meet with them?

Speaker 2: Yeah, so I think it goes to really trying to hone in on what their challenges are. But I think in having something to offer them without asking for anything back, so I'm working in the public sector right now and for the governor's office, all of their data is public. So it's really easy to understand what's on their agenda, what's important to them. And so I might schedule a check in where we asked for a meeting to share our perspective on future of workforce, which is something that's really, really important and on their mind and share just a little bit of our thought leadership and give them some food of thought and like a takeaway packet and not ask them for anything for us, but ask what would be helpful for them. And I would probably do that a couple of times trying to bring them something interesting and thought provoking that would be helpful for them. And try to be someone that they want to talk to because I'm there to help them versus feeling like they have to

make time for me, give me something. As I'm doing that and earning their trust and building a rapport, hopefully I'm getting more information from them that might help me tee up an opportunity. And hopefully they come to me, they start coming to me with questions or ask of things that they need, and then we can turn that in into an opportunity. I would say like a six month lead time where you're trying to break in and create a new relationship.

Speaker 1: Got it. And do you take any of these relationships also slightly more personal, like having dinner with them and your family or anything like that?

Speaker 2: I think it really depends. It depends on how much I want to invest, how long I think you have. So I think yes, but it really depends.

Speaker 1: That makes sense. And then do you think that there are other relevant situations that you encountered clients that I didn't touch on? I know one that has been brought up is escalations and when things aren't going super well/ I don't know if you want to go into that or if you have another one.

Speaker 2: Yeah. I think the biggest thing is to not try to assign blame. My general first response is to try acknowledge, okay, so we've got a problem and let's work together to fix it. I even do that internally rather than a who's at fault and who has to fix it, it', we're all in this together and we will fix it. And if that means we help the client fix something. And that means Accenture is up and we have to help, like we have to fix it. I just try to deescalate the emotion. It can maybe the heightened response around it to just say like, okay, first and foremost we're going to find a solution and let's figure it out together.

Speaker 1: Then I would like to shift focus a little bit and talk about the future of work from the Accenture perspective. So, first one, how do you think our projects are going to be structured going forward?

Speaker 2: I think it's going to really depend on industry and region. I think it has a lot to do with the client, right? The client culture. Ultimately I think Accenture will respond to what the clients want and what the clients are willing to pay for. I mean, like in the west coast where we have a lot of consumer or CMT clients who have been working remotely for years, I don't think we're going to go back to working the office regularly. I think some will be continue to be totally remote. And I think some are going to be hybrid. Differences in like Texas where a lot of our oil and gas clients have been back at work in the office for months now, I think they're going to ask us to be in the office. I think generally speaking, we follow what our clients want. We try to meet them where they're at.

Speaker 1: Do you have an idea of what your ideal structure would be?

Speaker 2: I personally would love to be remote the majority, I'd say probably 80% and 20% going into the office or meeting in person for key meetings. Not just to sit in the office to work, but for a purpose to meet and work with people face to face. And then personal, or I'd say like meeting people in person for lunch or coffee or some of the things to just kind of establish a personal connection.

Speaker 1: Perfect. And then if we think about our buildings, like innovation hub, offices, any of that sorts, do you think that we also need to change them to one meet better as colleagues, but then also to, to have a better space to collaborate with our clients?

Speaker 2: I think that would be great. Some places we have are awesome, but like in Denver we don't and so I don't feel like I have a good spot to bring my clients. But if I had a great, awesome space, like our say Francisco office, I certainly would be more inclined to bring my internal teams together or my client to work together in the Accenture office.

Speaker 1: Got it. And then is there anything else that you think we could do to continue to strengthen our company culture? Is it bringing back office days or having Christmas parties or gift giving, anything of that sort?

Speaker 2: I think all of that, I think people are relatively burnt out. I think one thing that we did that was great before that we have steered away from was no internal meetings on Fridays. I think that that was a really positive thing and it allowed people to get caught up on work and go into the weekend feeling like they had accomplished something because we were just so meeting heavy right now. I absolutely think the ability to get folks together for a more informal opportunity and pay for them and the budget to do that. I think it's really helpful. I also think, I'd say being respectful of people's family, like working hours. I think it's just really easy to see meetings come in from 6:00 AM to 9:00 PM.

Speaker 1: All right. I have three final questions for you, and then I can get you out of here on time, but what's the number one advice that you'd give a person currently managing a client engagement?

Speaker 2: Focus on the long game, there's lots of little things that'll come up along the way and that can derail you. I do focus on the long game and focus on building trust because where there's trust you can get through just about anything.

Speaker 1: Awesome. And what makes a client engagement a success on your opinion?

Speaker 2: I'd say mutual trust and respect and I think mutual trust and respect because then you're both in it for the right reasons and you're both in it for the same outcome and you'll work together to drive that outcome and be less focused on tip for tech.

Speaker 1: I like this, you are my 25th interview and you're the first one to say this. This is very nice. Do you have any last pieces of advice or thoughts that you would like to share around any of the workplace settings or future of work topics?

Speaker 2: I honestly think just it's how you present. I think one of the things is building an extra time to have personal conversations. I also think that it's how you present yourself and how you come across. So I you're trying to build, or when I'm trying to build a more personal connection or a personal relationship, I don't put a team's background on and I may be in more casual clothes. I think it's going to be interesting to see how the workforce continues to shift because I think Accenture will respond to our clients and I think that'll dictate how we shape what to do. And I think there will be some people that that works for. I think some people will continue to want to be a hundred percent remote and it'll be interesting to see what talent shifts happen as a result of that.

Speaker 1: This is awesome. Thank you very much.