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Are Traditional Consultant Roles Obsolete in the Era of Digital Transformation?

Exploring Management Consultants' Perspectives

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Abstract
Management consultancy services are an indispensable part of corporate life and scholars have extensively studied the consultants' roles in projects. In this thesis, we study if the previously identified roles dominate in Digital Transformation (DT) projects as well – a context in which consultants' roles have been less studied. Additionally, the new digital age was claimed to have a vast impact on both the needed skill set and the role of consultants. Drawing on twenty interviews with consultants at a large consultancy firm and role concepts from the management consultancy literature, we describe several nuances of existing roles that emerged in the context of DT. As part of our study, we also identified one new role that has not been recognized in previous research, *spider in the web*, present its distinguishing characteristics compared to other roles and discuss if this new role is unique for DT projects or if it is likely to exist in other consultancy projects as well. Our thesis also enriches the debate on under what circumstances consultants take on or switch to different roles. Consequently, this thesis may inspire future empirical research to explore consultants' roles from other viewpoints, test the newly discovered role in circumstances other than DT as well as investigate role switching and combinations of roles.

Keywords
Digital Transformation (DT), consultant, management consultancy, roles.

INTRODUCTION

As a reaction to the exponential growth of the management consulting sector in the 1990s, which last generated revenues of US$ 693 billion and employed more than 5.5 million people globally (IBISWorld, 2022), academic interest in this field has increased significantly. One of the most researched areas within management consultancy is the role that consultants take when engaging with the client. Being rather broad, management consulting gives way to a range of different roles for the actors to perform (Furusten, 2009; Cerruti et al., 2019; Richter & Niewiem, 2009; Kitay & Wright, 2003). Some authors claim that there are probably as many definitions of consultants' roles as there are consultants (Furusten, 2009). This vast amount of research on consultants' roles can be categorized into two streams of thought which exist in parallel. The functional stream defines consultants as *experts, advisors, knowledge brokers,* or similar, whereas the critical literature frames consultants as *fashion setters, gurus,* and *standardizers*.

In the past few years, the market for specifically digital and technical consultants has been growing as a result of the rise of Digital Transformations (hereafter: DT) (Cozmiuc & Pettinger, 2021). DT has been defined as "a process that aims to improve an entity by triggering significant changes to its properties through combinations of information, computing, communication, and connectivity technologies" (Vial, 2019, p. 118). As surveys have shown, businesses feel pressured to engage in DT, regard DT as their top priority, and most companies feel they need outside help (Taylor, 2019). Together with consultants, they try to overcome challenges, such as developing a new digital strategy.

Until now, the topic of DT in relation to consultants' roles is an area that has been neglected by researchers. Some researchers have, though, pointed toward the radical changes that DT will induce into the consultants' roles and the "rules of the games in the consulting business" (Cerruti et al., 2019, p. 903) in general. It is claimed that instead of traditional strategy consulting, IT-driven consulting services with technology-based analytics and tools are on the rise (Christensen et al., 2013). Even the European Federation of Management Consultancies Associations stresses the major changes in the industry driven by DT (Feaco, 2018, 2019). In addition, consultants' skills and methods are expected to change in the digital age, or as some authors claim, DT initiatives ask for a new generation of consultants (Krüger & Teuteberg, 2018, p. 3). This potential role shift towards new and extensive technical knowledge while simultaneously having a wide strategic scope has raised the interest of scholars within consulting research. Specifically, some researchers expect consultants to take on new roles in DT projects compared to other projects. However, empirical research on the impact of these changes on consultants' roles is almost non-existent, with Krüger and Teuteberg (2016, 2018) as notable exceptions. Therefore, management scholars have been urged for increased research efforts and empirical studies in the areas of management consultants and DT (Cerruti et al., 2019).

This thesis investigates what roles consultants take in DT projects, according to their perspective, and whether DT influences and shapes the roles consultants take. We pose the following research question:

What roles do consultants take in DT projects?

To answer the research question, we conducted a single case study with EY Sweden and collected the accounts of twenty consultants in terms of how they describe their role in DT projects. Aiming to identify similarities and differences between the consultants' roles in DT projects in contrast to other projects, we compared our empirical findings to well-established role concepts in the management consulting literature.

Our findings, including a detailed description of specific characteristics of roles found in the context of DT, provide new insights into the consultants' understanding of their roles and add to the management consultancy literature. We find evidence that the consultants identify with roles that have been mentioned long before the Digital Revolution. Yet, we also show how DT conditions consultants' perceptions of their roles and how these roles unfold slightly differently. These roles are *change driver, trusted advisor, transformation partner, specialist*, and *generalist*. Our study indicates that the rise of DT projects might not have as large of an impact on the consultants' roles and identity as predicted by researchers. However, we have identified one new role, *spider in the web*, that, despite the rather extensive research on roles, has not yet been recognized in the management consulting literature. We argue that this new role is important and relevant outside DT projects but might be more likely to appear in projects with characteristics similar to those of DTs, for example, a high complexity, large scope, and long timeframe. Lastly, we shed light on the phenomenon of role switching and present four new factors that determine which roles consultants take and when. These factors are the nature of the project, digital maturity, organizational area, and seniority.

THEORETICAL FRAMEWORK

Previous research on consultants in DT projects

Christensen et al. (2013) were among the first ones to proclaim the disruption of the management consulting industry caused by DT and to suggest that not only traditional business models but also consultants' skills are changing. However, with regard to consultants and their role in DT initiatives, there has been fairly little empirical research (Mosonyi et al., 2020).

Krüger and Teuteberg (2016), who conducted a multiple case study with nine experts, including EY consultants, point towards an assembly of cross-disciplinary competencies and experiences that consultants need for DT projects. The authors question the traditional distinction between IT and strategy consultants, as IT consultants must increasingly deal with situations of organizational change, and strategy consultants advise in technological projects. Furthermore, Krüger and Teuteberg (2016) state that a role and skill shift is to be expected. New skills mentioned are agile methods, coding skills (Krüger & Teuteberg, 2018; Bode et al., 2021), data and technical skills (Crișan & Marincean, 2023), which call for a new generation of consultants (Krüger & Teuteberg, 2018, p. 3). Krüger and Teuteberg (2016) also claim that the success of a DT initiative is significantly dependent on the change management approach adopted by consultants, which makes leading and managing change at client companies an important skill, also for IT consultants. Some researchers state how consulting in the digital age is no longer about trust or prestige (Christensen et al., 2013; Glückler & Armbrüster, 2003) but rather about providing knowledge, solutions, and data (Crișan & Marincean, 2023, p. 16). However, consultants do not only provide knowledge as access is now widely available but "gather, sort, filter and extract relevant data" (Crișan & Marincean, 2023, p. 16). Further, Christensen et al. (2013) claim that the recent democratization of knowledge, as a consequence of the digital revolution (p. 111), will lead to more science-driven and IT-based consulting and that elite identities or the distribution of standard management concepts and solutions will disappear. Along with that, tacit knowledge, professional judgment, or expertise are believed to become less important. As presenting decks of slides is not enough anymore, consultants are more involved in the process of implementing recommendations, leading to a wider ‘package’ of services (Vladimirovich, 2022). ‘Digital consulting’ is, on the one hand, claimed to lead to consultants becoming “full-fledged partners” (Vladimirovich, 2022, p. 27) who create new opportunities, and on the other hand, regarded as resulting in a weaker client-consultant relationship (Nissen & Seifert, 2015).

Except for Krüger and Teuteberg’s studies (2016, 2018), which mainly focus on IT consulting companies and a skill shift, more recent empirical investigations on the roles of consultants in DT projects are lacking. However, there is extensive research on consultants’ roles in general, and therefore, we will draw on well-established role concepts as a theoretical framework for our study.

Consultants’ roles

Since the 1990s, the activities of consultants widened due to the whole industry’s growth, so that several new and more ‘hands-on’ roles emerged (Armbrüster & Kipping, 2003; Werr et al., 1997). Today, these many different roles can be divided into two theoretical perspectives, functionalist and critical (Mosonyi et al., 2020). While the functionalist view takes for granted the knowledge and value of consultants, the critical literature questions this (Werr & Styhre, 2002) and draws attention to the more ambiguous role of consultants (Mosonyi et al., 2020). We will first present roles from the functionalist perspective before moving on to the critical perspective and the question of whether one consultant stays within a single role or not.

Change Agent

Management consultants have been included in many classification models of *change agents* that were being developed in close relation to Lewin’s (1890-1947) model of unfreezing, moving, and refreezing (Ottaway, 1983; Tichy, 1974; Caldwell, 2003). According to these models, change agents play significant roles in initiating, managing, and implementing change in organizations (Werr & Styhre, 2002; Caldwell, 2003). Ottaway (1983) conceptualized consultants as “external change implementors” (p. 384) who are invited from the outside to implement change. Even today, the notion prevails that the value of management consultants comes from their ability to change their clients’ organizations and formulate new ideas or managerial perspectives to address their business problems (Crișan & Marincean, 2023; Ginsberg & Abrahamson, 1991). According to Caldwell’s (2003) model, consultants are expected to provide advice, expertise, coordination and project management skills in order to facilitate change.

Different methods and tools to induce organizational change are widespread both in practice and in literature (Werr et al., 1997). However, some scholars argue that the consultant’s personal skills and experiences are more important than the methods. In order to produce effective organizational change, it might be required to work with people’s mental models (Retna, 2016; Senge, 1990). That implies challenging existing assumptions and beliefs and encouraging people to think differently.

Expert vs. Generalist

Foremost the functionalist literature depicts consultants as *experts* or external resources that are brought in as needed and bring knowledge where it is lacking (Furusten, 2009; Hargadon, 1998; Hargadon & Sutton, 1997; Bessant & Rush, 1995). The role of the expert gives utmost importance to mostly functional or specialist knowledge, in some cases also industry knowledge (Richter & Niewiem, 2009). Consultants as well regard themselves as either experts, professionals, or even elite, with a particular area of competence (Mosonyi et al., 2020; Furusten, 2013), providing expertise that is unavailable or hard to access (Richter & Niewiem, 2009). In their role as experts, consultants become authorized on the market through the mechanism of trust and the construction of the expert identity, facilitated by demonstrating versatility, availability, relevance, and differentiation (Furusten, 2013). Experts are often associated with an I-shape profile since these profiles imply deep knowledge within specific disciplines, lacking cross-discipline experience or knowledge (Cederberg et al., 2019).

In contrast to this deep knowledge in narrow streams, consultants can also take the role of a *generalist.* Generalists are often linked to a T-shape profile, implying broad knowledge on the horizontal bar and a deep technical understanding on the vertical bar, which generates an interdisciplinary skill profile (Krüger & Teuteberg, 2016). Additionally, Kubr (2002) describes how generalists prepare and coordinate assignments, negotiate and supervise, as well as are responsible for planning and the presentation of proposals. In order to complement their limited expert status, generalists engage in networking and high levels of interaction as well as customize their solutions significantly more than experts (Brandon-Jones et al., 2016; Sarvary, 1999). Generalists have a broad view of an industry and are focused on analytic and communicative skills (Ambos & Schlegelmilch, 2009), enabling them to operate in a larger market, experience diverse or challenging work, and offer new perspectives (Jackson, 1980).

Communicative skills have also been deemed important in order to establish a common language in client-consultant relationships and avoid communication barriers (Werr et al., 1997; Sutter & Kieser, 2019). To do so, consultants adapt and simplify concepts to make sense in the client's context, which can also be described as translation (Werr et al., 1997; Clegg et al., 2004), a rather creative activity of consultants' work. In fact, consultants use translation to bridge or create previously non-existent links "between differing language" (Clegg et al., 2004, p. 40). It is consultants' multicontextual knowledge and bilingual skills that allow them to translate knowledge among different contexts and actors (von Platen, 2015). An example of a common translation process is translating (business) strategy to the technical level (Bode et al., 2021).

Other knowledge-related roles

Management consultancy, in general, is seen as a key "generator and distributor of new knowledge" (Thrift, 2005, p. 36), and knowledge intensity is widely recognized as the hallmark of the industry (Richter & Niewiem, 2009, p. 275). For example, Bessant and Rush (1995) argue that consultants function as a bridge in technology transfer processes and facilitate learning in the client organization by lowering knowledge barriers and closing managerial gaps. Further, some scholars differentiate between levels of tacitness or explicitness of knowledge, whether it is experience, methods, or cases, as well as ‘esoteric’ or ‘technical’ knowledge (Bessant & Rush, 1995; Werr & Stjernberg, 2003; Kitay & Wright, 2003).

Regarding knowledge-related roles, Canato and Giangreco (2011) developed the roles *information source, standard setter, knowledge broker,* and *knowledge integrator*. For example, consultants act as information sources who can enhance decision-making through their superior availability of relevant information (Brown & Eisenhardt, 1997; Canato & Giangreco, 2011). The role of a knowledge broker (also *pollinator*) is to transfer and diffuse knowledge across markets, industries, projects, and clients (Hargadon & Sutton, 1997; Hargadon, 1998; Cannato & Giangreco, 2011), whereas the knowledge integrator implements the same solution in several projects, having accumulated specific industry knowledge. Other authors also stress the relevance of industry-specific knowledge or ‘sector knowledge’ (Richter & Niewiem, 2009; Fincham et al., 2008).

Advisors, Partners and Prophets

Similar to the change agent role, consultants have been called *advisors* for several decades. In that role, consultants support clients in achieving organizational objectives by identifying and seizing new opportunities and enhancing learning (Kubr, 2002, p. 10). Advisors begin their careers with occasional tasks and perform their duties with excellence and expertise until their clients see them as valued resources (Maister et al., 2000). Therefore, trustful cooperation is seen as an important success factor for the client-consultant relationship (Werr & Styhre, 2002) and for consultants to reach the status of a *trusted advisor* (Maister et al., 2000). Sheth and Sobel (2000) describe the journey of how consultants move from a transactional basis of providing expertise over the role of a “steady supplier” (p. 14) to the final stage of a trusted advisor who consistently develops collaborative relationships. Personal relationships and shared social characteristics have been named crucial in developing trust relations and bridges between the organizational boundaries that separate clients and consultants (Sturdy et al., 2009). Some clients have clear preferences with mostly personal criteria for the selection of consultants, which means that if they harmonize socially and trust a specific consultant, this is the one they prefer to hire (Furusten, 2009).

The role of the (trusted) advisor can be connected to three other roles or rhetorics, as identified by Kitay and Wright (2007). *Partners*, for example, resemble advisors, as they are equal to the client, work alongside their clients towards a common purpose, and build long-term relationships. In these relationships, which are seen as partnerships, consultants guide their clients and tailor services to their needs. As mentioned by Werr and Styhre (2002), for that partnership, deep knowledge about the client organization and an “organizational memory” (p. 55) held by the consultant become important factors.

The *prophet*-rhetoric is most often used by consultants when dealing with unstructured problems and long-term horizons (Kitay & Wright, 2007). Here, the consultant has to be visionary, see the ‘big picture’, and lead the client to “uncertain ends far in the future” (ibid., p. 1624). Sometimes, the clients themselves feel as if they possess a limited ability to look at the 'big picture' or overcome their shortsighted perspective, which is why they turn to external consultants (Werr & Styhre, 2002).

Lastly, the rhetoric of the *business person* introduces new kinds of tasks to the consultant's role, for example, the responsibility to win new business or sell new assignments, meet financial targets, and work with other consultants (Kitay & Wright, 2007). The business person is expected to have good business and good communication skills.

Whether consultants as advisors, partners, or prophets remain *outsiders* who are independent of the client, analyze their problems objectively or with "fresh eyes" (Werr & Styhre, 2002, p. 47), or whether they become *insiders*, having spent a long time working alongside clients, has been discussed by several scholars. Kitay and Wright (2004) argue that, depending on circumstances, the boundaries of the role of consultants as insiders or outsiders in client organizations are often blurred.

Agents of Stability, Standardizers and Uncertainty Agents

Taking a more critical stand, Furusten (2009) suggests that instead of being change agents, consultants are, in fact, *stability agents*, offering standardizing solutions to help clients reduce uncertainty. Stability agents "plant particular standardized management models wherever they go" (Furusten, 2009, p. 266) and carry ideologies between organizations and societies. This follows Wright et al. (2012), stating that claimed management innovations are most often highly standardized or incremental instead of ground-breaking and revolutionary, which contrasts with the role of change agents. As *standardizers* (Wright et al., 2012), consultants ensure adherence to procedures and apply standardized methodologies. Thus, when new 'best practices' are introduced, local organizational idiosyncrasies are eliminated, and practices are reformed to fit new standards (ibid). Furthermore, consultants act as *uncertainty agents* when, by managing uncertainty for the client, they try to produce a psychological effect (Cerruti et al., 2019). This means that consultants are hired to deliver confidence and reduce the uncertainty of managers or the organization, which renders the actual consultancy service less important (Furusten, 2013; Furusten, 2009).

Fashion Setters, Gurus, Witch Doctors and Impression Managers

The critical literature on management consultants focuses on the strategies consultants employ to convince clients of their value and exceptional knowledge, despite the lack of a formal knowledge base (Werr & Styhre, 2002). To illustrate, Abrahamson (1996) categorizes consultants as *fashion setters*, disseminating management fashions, whereby they redefine beliefs about which management techniques are rational and progressive. In addition to fashion setters, Clark and Salaman (1996a, 1998a) have coined the expression of consultants as *management gurus*. Gurus recommend an "almost magical cure or transformation" (Clark & Salaman, 1998a, p. 138) that disregards concepts from the past in order to reinvent or transform practices, structures, and culture, regardless of the efficacy of their recommendations. Another term used in the critical literature to describe consultants is *witch doctors* who "wave their magic wands and instantly transform organizations" (Furusten, 2009, p. 266). The more magic and mystery in their performance, the more successful they will be (ibid). As part of all roles mentioned here, consultants might make use of jargon, rhetoric, storytelling, and elitism (Alvesson & Robertson, 2006) to create "symbols of expertise" (Clark & Salaman, 1998b, p. 22), demonstrate the qualities and appropriateness of their solutions and bring the client to make a positive judgment about the often expensive service (Abrahamson, 1996; Clark & Salaman, 1998a). Another strategy to convince clients is to refer to "other famous, successful, senior clients" (Clark & Salaman, 1998a, p. 151). This 'managing of impressions' has led to the creation of another role, the *impression manager,* who focuses on "the manipulation and regulation of images relating to client perceptions of the service delivered" (Clark & Salaman, 1998b, p. 19). Consultants become "systems of persuasion" (Clark & Salaman, 1998b, p. 18) and manage the impression of an often intangible service (Kitay & Wright, 2007; Werr & Styhre, 2002; Clark & Salaman, 1998b; Furusten, 2013).

One consultant - one role?

Most scholars tend to refer to consultants as having a single role, however, some argue that in practice, the boundaries of the roles consultants take are not as clear-cut, allowing them to shift to different roles depending on circumstances and situational specificity (Sturdy et al., 2009; Styhre et al., 2010). Further, Styhre et al. (2010) not only acknowledge that consultants serve many specific roles but that they alter between complementary and even contradictory roles. Canato and Giangreco (2011) portray consultants as combining different roles in a comprehensive rather than mutually exclusive manner, depending on organizational arrangements and company size, which might lead to the consultant being a "patchwork" of roles and positions (Styhre et al., 2010, p. 160). Moreover, Canato and Giangreco (2011) propose that consultants take different roles in the course of the same project and that these transitions happen because of changing team constellations. Another factor that moderates which role consultants take is the client's industry, that is, whether the client adopts or develops innovations (ibid.). Some scholars propose that it is easier for experienced consultants to switch between roles in a non-disruptive manner than for consultants with a narrow professional domain or junior consultants whose expertise can be disputed (Styhre et al., 2010). It is exactly the ambiguity of consultants' roles that makes it difficult to decide when, how, and why to switch roles (ibid.).

Summary

Consultants have been attributed a range of different roles. We have presented the *change agent*, who manages and implements change, the *expert,* who introduces specialized knowledge, and the *generalist*, who possesses an interdisciplinary skill profile. Stressing the importance of knowledge, consultants have also been ascribed roles like *knowledge broker* and *knowledge integrator*. As *advisors* or *partners*, consultants build close and trustful relationships with their clients. In addition, we presented roles from the critical stream of literature, for example, *agents of stability* or *fashion setters*, which question the value of and contributions made by consultants. Finally, we introduced some arguments from scholars who acknowledge fickle boundaries between roles and the activity of role switching.

In the following sections, we will outline how we collected and analyzed our data, then present our findings before returning to the roles presented here. We will use these to analyze our findings and carve out differences and similarities.

METHODOLOGY

In order to answer the research question of this study, qualitative methods were deemed the most appropriate since they are useful when collecting and analyzing data about everyday phenomena, as in this research project (Silverman, 2013; Silverman, 2020). We chose a case study approach as we aimed to produce concrete and context-dependent knowledge relating to consultants' roles in DT projects. The detailed examination of different accounts in a single management consultancy firm can even produce reliable and transferable results about the broader industry (Flyvbjerg, 2006; Silverman, 2020). EY Sweden was chosen for our case because it is a large and well-established consultancy company, so the probability of finding consultants working with DT was high.

Expanding on the global organization EY, it is a professional services firm with over 700 office locations in more than 150 countries (EY, 2023a). With a focus on "building a better working world", EY works across their integrated service lines such as Assurance, Consulting, Law, Strategy and Transactions, as well as Tax (EY, 2023b, c). EY's values are integrity, respect, teaming, inclusiveness, energy, enthusiasm, and courage to lead, which guide more than 300,000 people (EY, 2022a). In 2022, EY's total revenues were US$ 45.4b, with a growth rate of 16.4%, and their consulting business grew by 27.1%, with a revenue of US$ 13.8b (EY, 2022a).

The service line Consulting, which employs almost 110,000 people worldwide, is structured into the following organizational areas: Tech consulting, Business consulting, and People Advisory Services (PAS) (EY, 2022a). Each organizational area is divided into several competence areas. EY Sweden has 49 offices and employs 2,910 people (EY, 2022b). In Sweden, EY has been ranked as the most attractive employer in the auditing and consulting industry as well as in the financial sector in 2022 (EY, 2022b).

Within EY Sweden, we communicated primarily with a designated contact person, himself a consultant, who provided us with appropriate consultants to interview. One of the reasons for having a contact person within the case company was that we had limited insights into which employees have worked with DT projects. Eventually, our sample of consultants was considerably diverse regarding age, gender, experience, organizational level or area, positions, as well as specialization, such as industry or technology expertise. This diversity not only helps to preserve the respondents' identity but also widens the point of view by including diverse interpretations. Out of the twenty interviews we conducted, fourteen consultants belonged to Tech consulting, four to Business consulting, and two to People Advisory Services. The reason for including consultants from all three organizational areas is that both Business and PAS consultants are frequently involved in DT projects as well. The consultants were either based in the Gothenburg or the Stockholm office. We only refer to the consultants as 'Consultant X' in the empirical section in order to keep anonymity. Unfortunately, no observations, which would have been useful for the triangulation of our study, were possible at the case company. Instead, we added document studies as another data collection method. A grounded theory approach, including a constant comparative analysis, was chosen for the data analysis as it is a good fit for qualitative methods and an inductive research design (Glaser & Strauss, 1967; Martin & Turner, 1986; Turner, 1981).

Data collection

For this study, data was collected through interviews and document studies. Interviews are well suited here, as they explore voices and experiences as well as yield accounts of individual consultants' perceptions about their roles (Silverman, 2020). The interviews were semi-structured, allowing us to ask follow-up questions whenever something interesting was brought up while covering all predefined topics (Bryman & Bell, 2011). Thus, this interview type allows flexibility, but comparability is ensured at the same time (ibid.). An interview guide was prepared, although it was not shared with the interviewees in advance, except when specifically requested, which ensured spontaneous answers. The three main themes of the interview guide were related to the consultants' role, their understanding of DT as well as the challenges of DT, and the challenge of managing change in particular. The themes and questions evolved during the course of data collection, as some topics caught our attention, and other themes proved less useful.

The data collection process lasted for nine weeks; all interviews were conducted digitally and were recorded, as agreed with the interviewees in advance. During the interviews, we employed mostly open-ended questions in order to induce spontaneous talk and to ensure authenticity (Silverman, 2020). Open-ended questions are also likely to generate a more considered response than closed questions, allowing the collection of genuine perceptions of consultants' roles. While mainly focusing on close listening, we also took notes during the interviews for follow-up or clarification questions (Czarniawska, 2014).

During the first couple of interviews, we could deepen our understanding of EY's organizational structure and processes before focusing more on how the consultants describe their roles. After twenty interviews of 45-60 minutes in length, a point of data saturation was reached, meaning that no new relevant information was obtained, as many rich accounts of the consultants' roles were already acquired (Glaser & Strauss, 1967). The length of the interviews was considered enough to understand the individual viewpoints. After each interview, the recordings were transcribed verbatim and coded. The quotes included in the empirical section were adjusted in order to make them easier to understand for the reader, however, ensuring they still represent the same meaning and context.

After all interviews had been coded, the last stage of data collection consisted of reviewing publicly available documents about EY since no access to internal documents was provided. The reviewed documents included EY's homepage, their annual report, and the 'transparency report', which is specific to EY Sweden. This document analysis enabled the comparison of the consultants' accounts with official statements and enhanced credibility. Moreover, the documents complemented the interviews with valuable background information and served as an overall framing for the consultants' roles in a DT context (Bryman & Bell, 2011). We draw on both interviews and document analysis to carve out the empirical section.

Ethical aspects regarding data collection, especially interviews, must be considered since a power asymmetry between the interviewer and the interviewee is present (Kvale, 2006). Interviewees might be prone to please the interviewer and say the 'right things', maybe even to shed a positive light on themselves and their organization (Czarniawska, 2014). However, we tried not to steer the consultants nor hint towards expected answers or affect the responses in any other way and offered them to skip questions if needed. Keeping the participants anonymous further encouraged them to speak freely and give honest answers. It is worth mentioning that EY has not imposed any requirements or conditions for publication or influenced the process in any other way.

Data Analysis

Our analytical strategy is based on the grounded theory approach. The advantage of this method is that it is very systematic, and it allowed us to keep very close to the collected data as well as iteratively develop dense conceptual analyses (Charmaz, 1996). Grounded theory is also well-fitted for data gathered from semi-structured interviews and from case-study material, as it is especially useful for analyzing large amounts of data (Martin & Turner, 1986; Turner, 1981). While aiming to grasp the specifics of the phenomena, in this case, the consultants' accounts regarding their perceived roles, a constant comparative method was applied to make sure the data analysis is theoretically based, and theory is grounded in data (Silverman, 2020; Glaser & Strauss, 1967).

After transcribing the interviews, we started coding them, at first, without trying to build connections to theory. To efficiently manage the created codes, we made use of the software *Atlas.ti* which made it easier to group the codes and search for them. The high number of initially created codes represented the complexity of the organizational context and allowed for a detailed description of the features of the data, however, in the next step, we had to discern the most important concepts. Examples of the initial codes are: *staying ahead of clients or competition*, *bigger picture*, *building trust*, *guiding the journey, networking,* and *the product is knowledge*. By engaging with the initial codes, we recognized relationships among them and we were able to build overarching categories, such as *knowledge, skills, stakeholder management, relationships, communication,* and *specialization* (Czarniawska, 2014). Some of these categories later proved to not be as relevant and out of the scope of this study. Additionally, information gathered from documents was coded and analyzed in a similar way as the interviews, drawing on the already constructed categories.

In the next step, we started comparing the field material with role concepts from the management consultancy literature to draw connections and find similarities and differences (Martin & Turner, 1986). Reading up on existing roles helped us recognize common patterns among codes and code categories that could be clustered under one role. This way, we decided on the broader themes for the empirical section, that is, the different roles enacted by consultants. Through this comparative analysis, most of the accounts and roles mentioned by the consultants proved to be, to a large extent, similar to roles from the management consultant literature. Nevertheless, we decided to keep the terms originally used by the EY consultants and to discuss varying nuances of roles from the literature in the discussion section. The comparisons between theory and data also led to the inclusion of only those roles in the theory section that proved most relevant and most useful for the analysis of the perceptions of roles obtained. During the analysis of roles, we also came across the phenomenon of switching roles which we will briefly describe at the end of the empirical section.

The study design allowed us to develop our own theoretical accounts in the form of one new role while simultaneously grounding this contribution to theory in empirical data (Glaser & Strauss, 1967). This new role emerged since parts of our data did not match with existing descriptions of consultants' roles. On the other hand, some roles presented in the literature proved not to be applicable to our study. For instance, we were not able to confirm roles from the critical literature, such as *fashion setter*, as we are investigating the consultants' perceptions where it is unlikely for them to criticize their own role or work.

EMPIRICAL DATA

Based on its homepage, EY describes its consultants as taking many different roles:

> We're change agents and cyber gurus. Performance improvers and problem solvers. Data scientists and growth hackers. Both programmers and software builders. Risk managers and confidence builders. (EY, 2023d)

Some of these roles were explicitly mentioned by the consultants interviewed, while others were not. In the following section, we present a number of roles consultants take, according to their perceptions and how they talk about themselves. We also provide evidence on role switching and its determining factors.

Change Driver

'It's all about the people'

One consultant explicitly describes himself as a "*change driver*" who helps his "clients to drive change" (Consultant 4). On EY's homepage, it is stated that EY is rightly rated by clients for "driving and supporting change across clients' organizations, delivering value-creating innovation, understanding clients' unique needs, and challenging clients to accept new approaches and solutions" (EY, 2023e). As change drivers, interviewees agreed upon, it is important to consider the people affected by DT. Change is especially difficult for people in large-scale transformations, where new technological tools are introduced and operating ways are changing simultaneously. When working with DT, it is necessary to understand the broader impact technologies have on the organization as a whole, as they both affect the roles and behaviors of people working with new systems or solutions as well as processes. Since DT touches upon a broad range of aspects within the organization, the necessity of managing change becomes evident.

> It's all about working with change on a bigger scale. It is important to make sure that people understand the system is not a silver bullet and that you need to change so much more, change behaviors, processes, people, roles. (Consultant 9)

Even though DT might be technology-heavy and focuses on technological details, there exists a risk of failure if people are neglected. In that case, it is of no importance how excellent the technical solution is if people are not open towards it, and defending the product or solution as a consultant then becomes less effective. Therefore, consultants need to be aware of how change is perceived by humans.

> We can implement any sort of technical solution, that's fine, but it would just be a box standing in a corner and blinking unless we have the processes to support it and the people to utilize it, and both the processes and the technology are all there to serve the people, so we need to think about those three elements all the time. (Consultant 18)

Putting “humans at center” is a new approach developed by EY based on research since transformations are now “a constant for all organizations, but success is far from guaranteed” (EY, 2023f). EY has identified six complex human factors that are supposed to increase the probability of success to more than 70% (EY, 2023f). These factors are “leadership (lead), vision (inspire), culture (collaborate), emotional support (care), technology (build), process (empower)” (ibid.). Knowing the importance of people in any change initiative, EY’s tech consultants regard change management as part of their responsibility and as closely integrated with technology consultancy.

Resistance towards technology and mindset changes

One consultant’s statement that all projects have the change management element is reinforced by another consultant who claims that change management is especially important in DT projects, as people are often inherently hesitant towards new digital technologies. Fear of replacement ranks high on the list of employee concerns, as technology can make people question their role in the organization. In some cases, the mindsets towards digitalization vary between different “pockets” (Consultant 13) of the organization, where some are more advanced and open towards technology adaptation than others. Therefore, consultants are assigned to work with less advanced parts of the company to align their attitudes and openness towards change or, as another consultant states, to change their mindsets.

> It takes a long time, especially, to change people's minds because most people are very resistant to [...] digital transformation in general because people have worked for 20 years and then they are like, ‘well, it works, so why do we need to change’. (Consultant 6)

An example of a mindset change would be when consultants support their clients to become more agile as a more convenient way to approach complex and fast-changing contexts where it is challenging to plan ahead. The challenge of becoming more agile is that it cannot be accomplished by giving employees simple “recipes” to follow (Consultant 11), rather, consultants support employees throughout this process and encourage them to internalize and manifest a different mindset.

Trusted Advisor

Trust and integrity

A common aspect of the perceived responsibility of consultants is the role of advising clients, for example, in terms of digital solutions. The consultants call themselves *trusted advisors* who work closely with the client.

> The role of consultants has many parts. But my angle or my own definition is to basically solve the client's toughest issues. And to be either a trusted advisor, more of a management advisor, or a transformation partner when it comes to more hardcore, hands-on experience in tech-related activities. (Consultant 14)

As one consultant described, she is there "to support the clients and advise them throughout the relationship" (Consultant 5). Indeed, several interviewees mentioned that building a trusted client-consultant relationship is essential in order to bring the client to share important information. To build such relationships, consultants bring up certain social skills, such as communication, listening and problem-solving, as well as qualities, such as curiosity, transparency, and vulnerability. It is also important to show an actual interest in the client as a consultant, try to solve their issues in the best possible way, and not let the feeling arise that consultants just want to generate business (Consultant 5). One consultant mentions how the "likeability" of a consultant influences whether they will be hired for subsequent projects and build a long-term relationship or not (Consultant 10). Another consultant describes that working with high quality and integrity will automatically establish trust. Integrity also includes not trying to oversell something that cannot be delivered.

A specific task for the trusted advisor working with DT projects is to identify new business opportunities through the use of technologies or IT systems. This is also stated on EY's homepage, where the company describes its role as helping businesses "transform and evolve quickly to seize the opportunities and help mitigate the risks that digital transformation creates" (EY, 2023e). Essentially, what consultants claim they do as trusted advisors is offer their advice or opinions and guide their client's journey, enabled by their skillset. They analyze the gap between where the clients are at and where they want to be, and guide them, showing options and bringing attention to common pitfalls on those journeys. Overall, it is stated that clients reach out to consultants when they are in need of advice on how to solve their problems.

Up-to-date knowledge

In order to fulfill the role of a trusted advisor and be able to solve problems, the consultant has to be knowledgeable and up-to-date with regard to the latest technological advancements. Consultants are expected to be "on top of everything" (Consultant 3), implying knowledge about the products in the marketplace, their function, new trends and releases, and the 'right' solutions for their clients.

> We need to be on the front line to make sure that we know what digital tools [exist] and what other companies in the rest of the world are doing because it is important to not only look at

> your sector but also look at other sectors to see where we can embrace solutions. (Consultant 7)

Knowing about industry trends and new solutions might lead to situations where the consultant challenges the clients in their point of view and their opinion about the best way forward with possibly provocative ideas. Indeed, consultants say that challenging their clients increases respect toward them (Consultant 3). Trusted advisors should also help the clients "travel new paths" (Consultant 7) and inspire them to do things differently.

> …to support the clients in becoming better and advising them throughout the relationship, in terms of many different aspects, not only what our project is there to do, but other areas we notice, to inspire them to do things differently, and that means collecting information from our own know-how, delivering it to them and also by learning throughout the project that we are actually in. (Consultant 5)

Blurred lines between insiders and outsiders

In their role as trusted advisors, consultants are usually not in the position to make decisions but can only suggest ways how to proceed, as some of them mention. They can offer proposals but do not bear full responsibility for whether the client will take the recommendation. This view stresses their position as external agents. On the other hand, the role of a trusted advisor is one of the roles that imply a long-term engagement with the client, which might lead the consultant to become closer to an *insider*. One consultant explains:

> I think for this program, it is a bit different because it is not the classical [approach where] you come in as a consultant to solve something for the client, and then you leave. So we are more part of the company, I would say, doing this transformation together with them. So it is almost like we are employees, but we are consultants. (Consultant 9)

As she comments, in other types of engagements, consultants usually experience difficulties when trying to be viewed as belonging to the client company, and most of the time, they are regarded as *outsiders*. However, it is common for consultants to try to become "one of them" (Consultant 7) so that employees feel that they are understood and the consultant is not perceived as an all-knowing expert. In other instances, the role of an advisor might imply staying within the role of an independent outsider who is contracted in order to verify what the client has already assumed or identified as one possible way to move forward.

Transformation partner

Advancing the transformation

In contrast to the *trusted advisor*, consultants refer to another role where they "go in as a *transformation partner* more into the execution mode of the transformation" (Consultant 10). The main difference here is that transformation partners join the project in a later phase when the goals and the strategy of the project were already set previously (Consultant 10). Often, that implies shorter assignments since previous phases were already completed beforehand. Further, consultants describe that even though they usually enter projects in the execution phase, a transformation's duration varies from a couple of months to several years, depending on the nature of the transformation and its complexity (Consultant 13).

Another common aspect that has been discerned from the interviews is that transformation partners join projects at a stage when the clients feel "stuck" (Consultant 2), that is, they cannot finish the transformation themselves. Then the consultants come in as project managers or leaders, which often entails creating a project plan, assembling a team, and structuring the problem at hand. Many of the interviewed consultants explained that they usually take the role of a project leader:

> We are either a project leader or we are assisting a project leader at the client, or we are just helping them, not with the entire project [but] one process that we are very good at. But at the end of the day, we are helping them to sort of get from point A to point B in the best possible way. (Consultant 4)

In most cases, the aim is to reach the goal defined at the beginning of the project. However, goals can change along the way, and insisting on completing a project at all costs is often not in the interest of the client. Thus, it is more important to ensure that consultants actually deliver 'value' and not stick to past goals.

Part of being a transformation partner is to solve complex problems that might be solved in many different ways. Therefore, consultants need to have good problem-solving skills and the ability to think 'outside the box'. Consultants might enter new situations regularly with limited time to make sense of them and with the need to adapt fast to ever-changing environments and circumstances.

> The problem is that there is never one solution, so you need to think outside of the box the whole time and try to find a solution that is right for this customer, based on your previous experience, together with them. (Consultant 15)

This problem-solving also involves being pragmatic and working hands-on, or as one consultant puts it, "they needed someone to just come in and get their hands dirty, like shovel and work, and make things happen" (Consultant 2).

Specialist

I-shape profile

The role of *specialists* is to dive deeper into knowledge areas since they either focus on specific products and IT solutions or on industries. As one consultant puts it, "everybody cannot be a generalist, we need specialists within tech and within digitalization, of course" (Consultant 17). Some consultants even specialize both in an IT solution and an industry, like one consultant who is focused on the manufacturing industry and SAP solutions. Being specialized in a limited number of narrow areas of expertise is associated with an I-profile, usually present in junior consultants when they are trying to build their competencies.

> When people start early in the day and when they gather their experience or try to grow in the consultancy, a lot of people also choose to stick only with, let's say, a certain area and want to

> work and build their competencies only in one area. So they want to be more like an I-shape type, the main resource. For example, known only to be good at one [or] a couple of very narrow areas. (Consultant 13)

One way to reach the specialist status is to accumulate expertise, for instance, regarding a particular industry. Industry specialists bring value as they know about specific aspects of the industry, competitors, and new industry trends.

> And then you become sort of topic-aware, like what is happening within this particular industry, and then you become relevant, and it is easy to have a real conversation with people who are actually working there. Because if you come in like a generalist, like 'I have no idea what this sector is about', it is like, 'OK, what value can you have', you know. [...] When you are more senior, you both need to bring industry knowledge and what is happening trend-wise, what are the biggest challenges, you need to be aware of those. (Consultant 4)

A second way to be considered a specialist at EY is by accruing multiple years of experience within one area. One example is developing niche skills within the area of *Salesforce* as a result of having worked on multiple projects that evolved around that topic. One consultant mentions that "you cannot train people on experience" (Consultant 6).

> They want to have somebody that has done this solution many times, but in maybe different contexts, but hopefully in the same industry. And that is usually the case for consultants, I think, that you do something several times. And it is always a unique solution, but in the end, there are common denominators within industries, within size of companies or within cultural issues or within tech and systems as well, most likely. So it is a lot about hiring somebody that you know for a fact has solved this issue for other similar clients before. (Consultant 17)

This statement suggests that consultants are hired because the client can be sure that their problem is going to be solved, thanks to the consultants' experience. Even though this consultant claims that every solution is unique, by gaining experience, certain methodologies and approaches become standardized as well.

> We have not done it once, we have done it multiple times, we have developed methodologies, frameworks, templates, etc., that we can reuse for our clients. (Consultant 3)

Hence, depending on circumstances, both knowledge and experience are valuable for a specialist's work. The value of specialists is emphasized by a statement from one consultant, claiming that EY does not produce anything other than "people and knowledge" (Consultant 9). Therefore, knowledge becomes one of their strongest selling points which is why EY aims for fast competence building.

Expertise around data

In DTs, the technology expert who is "the go-to person", is often called "Enterprise Architect", "Solution Architect" or "Subject Matter Expert" (SME), in the case of senior experts (Consultant 6). One consultant describes how his highly specialized colleagues work on less transformative projects and are less involved in day-to-day activities. For instance, SMEs could only be involved 10% of their time in one project, interjecting only when difficult questions arise that require a lot of expertise.

> So being very, very specialized will limit you to certain areas, like I mentioned, for instance, more finance where it is less transformative. You have technology aspects there as well, then you have perhaps a different profile in some context. (Consultant 5)

Other expert roles in relation to DT refer to the importance of data, as a large share of the digitalization projects that the consultants work on revolves around the goal of becoming more data-driven. These specific expert roles consist of “Data Strategists”, “Data Quality Managers”, and “Master Data Management” (MDM) specialists, to name a few, and they have the competence to build the foundation of data-driven transformations (Consultant 12). Additionally, there are “Data Analysts” and “Business Analysts” who are responsible for working with clients to understand clients’ business needs, ensure and onboard the right data, and turn it into business insights.

Generalist

T-shape profile

Generalists seem to be working on a broad range of projects or industries and can discuss on a medium to a high level about multiple topics. They support clients on end-to-end journeys, including advising, executing, testing, and maintaining solutions. The characteristics of being a generalist are having broader responsibilities, being able to work across different private or public companies, and meeting new organizations regularly without having to ‘dive deep’. As a result, generalists can become creative with their ways of working and offer advice from different perspectives. Another consultant brings up the T-shape profile, implying not only specialization in one specific area but also possessing people skills and the ability to work in a team. T-profiles are usually found in senior consultants as they build their skills over the years.

> I'm more maybe…I wouldn't say Jack of all trades, but I am more of a generalist [...] than a functional specialist. (Consultant 4)

Consultants describe themselves as proactive, eager to learn, and ready to take on tasks they have never done before. By rotating between many different tasks or projects and interacting with different clients, they gain experience, which contributes to building their generalist “toolbox” (Consultant 5, 10, 12). Their skill set can be rather broad, ranging from communication and presentation skills to proficiency in a certain domain (Consultant 10).

> What I bring to them is not a technical nerd or technically oblivious project manager. I bring the kind of person who knows both areas on a pretty good level but is not really that far down in either of them. (Consultant 18)

DT as an interdisciplinary assignment for generalists

Some consultants believe the generalist role or at least possessing a broad skill set to be particularly relevant or beneficial for DT projects. This view might stem from the consultants' notion of what DT is. They do not see DT as a specific kind of project but argue that almost every project or transformation involves digital elements or the implementation of IT solutions nowadays. On the other hand, the more technology-heavy projects are still broad and touch other organizational elements, thus, a broad skill set is required as well. This agglomeration of processes, people, and systems, but also the entanglement of legacy systems, accounts for the high complexity of DTs.

> You do not do a transformation without having a digital component, I mean a digital transformation. I would say a transformation contains digital elements, it contains business elements, people elements, always. [...] That is my view on it. Then it can be more digital heavy or more business heavy, but you cannot not have both components. [...] I have not stumbled upon that yet. Maybe in some small area. (Consultant 10)

A company's business and IT strategy are nowadays closely interrelated, as business objectives are most often integrated with the help of technology. This requires consultants of any organizational area to work across disciplines and understand both the technical and the business side. Nonetheless, tech consultants are the ones expressing that business consulting is more general, insinuating that business consultants are more often generalists than specialists.

> I think more and more we are seeing that what used to be specific siloed strategy work, business design and so on, is now more and more infused with technology [...]. That's all technology-driven today. So we need to assess strategy, decide on which technologies we want to include, how do we do it more efficiently, and what is future-proofing in that sort of setting? And the same goes for business design, I think. (Consultant 18)

Regarding DT projects, it is claimed that consultants do not necessarily need to be experts on the topic but rather understand the basics of digitalization and how it can be applied to support business. If needed, they can get support from experts on a specific topic.

Translating

Part of a generalist's broad skill set is translating, deriving from the fact that technology and business divisions are more and more tightly coupled and they need to bring together people from both ends of the spectrum. Consultants describe how DT requires them to be good at understanding and aligning people's viewpoints across divisions, and support 'translating business into tech'. 'Translating business into tech' means being able to understand real-time business problems and provide support for programmers to respond with technology to what the business needs (Consultant 16). Translating also requires consultants to consider who their audience is and adapt the information according to different organizational levels. What is important here is conveying the right message to the right people or, as this consultant states, "making them talk the same language":

> I think I can understand and translate what people [are] telling each other without understanding each other, and being in between and making them talk the same language. I think that's the best skill I have. Even if I just speak English or Swedish or French and the SAP language, "SAPish". So I would say I am a translator. I think that is my skill, actually. (Consultant 15)

Spider in the web

Consultants take the role of the *spider in the web* when they engage in building and extending their networks. Consultants further explain the importance of networking not only within EY's internal organization but also externally, for example, at the client organization.

> …and to get that understanding, you really need to be a spider in the web, you need to have your eyes and ears a little bit everywhere. That's what I mean. (Consultant 9)

Stakeholder analysis

Oftentimes, the interviewed consultants bring up stakeholder analysis as one of the steps to identify and map all stakeholders at the client that are affected by DT and to inquire about their needs and expectations. The more stakeholders can be identified at the start of the project, the better. To do this, *spiders in the web* apply a snowball methodology where they ask certain stakeholders for recommendations as to which people to talk to next in order to reach people they did not know before. Sometimes they talk to a certain person to get a deeper understanding of someone else in the organization. Even though consultants claim to use a snowball technique, it is often impossible to follow a clear structural approach. Instead, consultants strive to simply talk to people and partake in networks or meetings (Consultant 9). As a general goal, the consultants try to identify the most influential people within the client organization to speed up the spread of information and use them as a catalyst. Reaching those stakeholders who have a certain standing within the organization can make their subsequent change work more effective. As *spiders in the web*, consultants might receive important information more quickly since they talk to just the right person, or they might hear about complaints that have not been communicated directly to them.

Building an ambassador network

Engaging with stakeholders might also help the *spider in the web* to build an "ambassador network" (Consultant 12), with ambassadors or "change champions" (Consultant 3, 16) being those employees who are not only influential but also proactive and knowledgeable. One consultant claims that no matter how closely they work with the client, it is difficult to penetrate into the business (Consultant 16). Hence, there are perks of having an ambassador network since ambassadors act as "spokespersons for the project" (Consultant 3) as well as "role models that are well known at the client's organization and linked to the purpose of the transformation" (Consultant 12). Ambassadors work together with consultants, spread the message within their organization, and ensure that everyone is aligned (Consultant 12). They can also act as coordinators where they help roll out the transformation in a phased manner

(Consultant 16). Some consultants describe that “change champions” could be hard to find, but once you establish this network, “you cannot put a price on that” (Consultant 4).

Considering company politics

Identifying the most important stakeholders and networking is also relevant in the context of organizational politics at client organizations. The interviewed consultants explain how sometimes, they experience demanding situations where they have to navigate and manage differing expectations, demands, or priorities between various lines of business, for example. It might be that they receive demands from managers whom they are not paid by or that some of the changes implemented have a negative effect on another manager’s department, which then has to be managed carefully. Another example is where different stakeholders, each driving their own agendas, urge the consultant to take care of their issue first:

> They all have their competing priorities, everybody wants attention. [...] Even if we say OK, first we will deal with the first two parts of the businesses, now we will deal with [the others]. But everybody wants attention. Everybody has competing priorities, so there are a lot of balancing acts and stakeholder management that one has to do. (Consultant 16)

Connecting clients

Another interesting aspect of this networking role is that consultants actively try to connect their clients with each other, for example, at round tables or seminars. This is because some clients seek inspiration from other industries or want to discuss common topics. Such settings enable consultants to get to know potential clients, get a deeper understanding of organizations, and discover their surroundings. Connecting with people in such settings also makes it easier for consultants to change their clients’ attitudes toward their services. Past clients' success stories can serve as a testimony for potential clients and help them realize the benefits of working together with consultants. According to one consultant, this is a strategy that makes it easier to convince clients.

> We are not only speaking from our learning, [...] we are also bringing in other clients to tell the story because that is an even more powerful way of telling the story of what the future could be and how it is to work with EY, et cetera, et cetera. Because clients, you can say, trust more other clients than maybe just us as consultants. Sometimes, it gives a lot of credibility. (Consultant 10)

Selling

Several consultants mention the pressure to sell future projects and to constantly think about sales, which is “not easy” because “sometimes you just want to do good work, you don't want to have an agenda” (Consultant 6). One strategy to sell projects is to present the client a long-term road map, for them to envision their future and for the consultants to “upsell” and “expand on the transformation” (Consultant 16). More importantly, networking and having ‘their eyes and ears everywhere’ is useful for consultants in order to notice other business opportunities within a client organization and then try to sell a new project to them. One consultant describes how she sits in the lunchroom to be approached and told about possible other 'pain points' (Consultant 7). Moreover, having a good client network, which most consultants build over many years, is beneficial when it comes to the appointment of project leaders. One consultant describes that for every new project, there is a search process within EY as to which consultant is most knowledgeable and experienced in a needed area or has the best credentials. Credentials are important for clients, which is why the interviewed consultants include past clients' industries on their CVs and in their pitches. These references to successful projects are crucial in order to be able to sell more services because "who wants to buy anything from a company which is constantly delivering failing projects, right?" (Consultant 13).

Taking various roles

Having identified and characterized different roles, it is worth mentioning that the consultants are not bound to only one role for all projects, within one project, or during their whole career. As one consultant puts it:

> I am the local responsible for the SAP local system temporarily, and in another project, I am a project member content lead for Treasury, and in another project, I am a coach for the enterprise architect, so very different roles [...]. I do not have the same role in the same project [...]. It changes during the project, during the phases. (Consultant 15)

Here she explains that the nature of the assignment decides upon which role the consultant takes and whether it is more about guiding and advising or more related to project management or IT systems. She continues illustrating how she takes a certain role at the beginning of a project but then changes role or exits the project when tasks are becoming "more concrete" (Consultant 15). Role switching is reinforced by another consultant who describes how, throughout the project, they are required to have "different hats to wear" (Consultant 13). Another conditioning factor for the roles the consultants take is whether they are grouped within People Advisory Services, Tech Consulting or Business Consulting, or even specific teams within those. For example, specialists are most often tech consultants, and business consultants more frequently take the role of a generalist. An interesting transition of roles is the one linked to the seniority of consultants. Some move from being a technology expert to a more generalist role as they gain experience, whereas some move from a generalist role to a more specialized one, for example, because they have built a relationship with a large client in one particular industry. Another reason that requires consultants to be mindful of their roles is the client organization's digital maturity. For example, in organizations that are quite digitally mature with "internal digital teams" (Consultant 16) or startups encouraging innovation (Consultant 9), consultants can be more inclined to take roles that encourage clients to travel new paths, such as trusted advisors, or transformation partners that collaborate closely with internal teams. In contrast, in organizations that are far from being digitally mature, there is a need for more intensive efforts to persuade people who are not familiar with digital ways of working (Consultant 9), which is why consultants can be more inclined to take on roles that require changing people's mindsets, such as change drivers.

Summary

We now presented six different roles (*change driver, trusted advisor, transformation partner, specialist, generalist,* and *spider in the web*), each with a different focus, that EY consultants take, according to their point of view. In addition, we also presented four determinants that enable consultants to take various roles, which are the nature of the projects, digital maturity, organizational area, and seniority. Next, we will discuss our findings in relation to the roles outlined in the theory section.

DISCUSSION

In general, we could identify many similarities between the roles mentioned by the consultants and roles from the functionalist literature. However, we also found certain nuances in the context of DT that distinguish the roles described here from previously identified roles, which we will discuss in the following. No matching patterns were found to roles from the critical literature. Our findings point towards a new role lacking in management consultant literature, the *spider in the web*, whose applicability will be discussed as well. Moreover, we discuss role switching as a common practice among consultants and the factors that cause this. Lastly, we respond to claims about consultancy services in the digital era and connect our findings to previous literature on consultants in DT projects.

Nuances of existing roles emerging in the context of DT

Change Driver

The *change driver* role shares many similarities with the role of *change agents* from the literature, such as being external resources (Ottaway, 1983), providing advice (Caldwell, 2003), and managing change (Werr & Styhre, 2002; Caldwell, 2003). Some consultants mention the need to change people's mindsets, which coincides with Senge's (1990) call to work with mental models in order to produce effective organizational change.

The change driver role might be especially relevant for DT projects, which face more resistance, as new digital technologies bear the potential to replace humans compared to other organizational changes, according to consultants. What was unexpected and interesting about this role is the emphasis tech consultants put on people, which contrasts with the literature where the focus has been more on implementing solutions (Ottaway, 1983) to the client's business problems (Ginsberg & Abrahamson, 1991).

Even though parts of the change driver's role consist of providing advice and possessing project management skills, such as planning and coordinating (Caldwell, 2003), consultants are aware that their work extends beyond simply check-marking some technical requirements of a DT. As a significant part of DT also involves changing processes around people, consultants have to pay extra attention to those elements. Similarly to Krüger and Teuteberg (2016), who claim that managing change could be considered a prerequisite to successful DT initiatives, consultants nowadays seem to work extensively with people in order to generate the most impact from their work. Indeed, the majority of consultants interviewed claim that all types of consultants should involve change management in their work since neglecting it might lead to failure (Caldwell, 2003).

Trusted Advisor

Maister et al. (2000) are one of the few researchers that explicitly use the term *trusted advisor* instead of just *advisor* and stress the importance of developing and strengthening a trustful relationship over time. The interviewed EY consultants used the exact same term to describe their role and, similarly to Maister et al. (2000), emphasized their quality of service as well as integrity. The element of trust is named a prerequisite for building long-term relationships with clients, both by consultants and the literature (Werr & Styhre, 2002; Sturdy et al., 2009). Moreover, trust plays a role in the selection of consultants since clients have clear preferences with mostly personal criteria as to which consultant to hire (Furusten, 2009). Similarly, we found that likeability plays a significant part in whether consultants are assigned subsequent projects and build long-term relationships with clients.

One interesting aspect we came across that reinforces trust and increases respect in their relationship with clients is the consultants' courage to challenge their clients about the best way to move forward. What allows them to do so is their up-to-date knowledge of industry trends and experience, which gives them the ability to easily distinguish and analyze the gap between where the clients are and where they want to go, recognize pitfalls and offer solutions. However, they are not in a position to make decisions for their clients (Werr & Styhre, 2002), regardless of their trusted status. In some cases, though, the trusted advisor might become an *insider* as opposed to an *outsider* since they collaborate very closely with their clients over a longer period of time. It can be considered a challenge until external advisors become trusted, start integrating themselves into the client organization's internal network, and are perceived as belonging to the company. Once they achieve that, the lines between the consultant as an *insider* and an *outsider* become increasingly blurred (Kitay & Wright, 2004) and less significant.

The trusted advisor also includes elements of the *prophet* role (Kitay & Wright, 2007) since they often have to deal with long-term horizons and are expected to be visionary or see the ‘big picture’. They give advice regarding future technologies as well as offer new approaches to the client organization.

Transformation partner

The role *transformation partner* can be claimed to be a nuance of the role *partner*, as it exhibits characteristics of problem-solving. However, it might be specific to DT, as the core responsibility is to advance the transformation. We could imagine that it is the digital technologies that impose a stronger client-consultant relationship, as clients require more support, leading the consultants to become “full-fledged partners” (Vladimirovich, 2022, p. 27). Transformation partners, in contrast to *trusted advisors*, enter projects at a different stage, but these two roles resemble each other when it comes to working alongside clients and building long-term relationships (Kitay & Wright, 2007). Transformation partners can be either *insiders* or *outsiders* (Kitay & Wright, 2004), depending on the circumstances of the project or the point of time at which consultants enter an organization. Due to the often shorter assignments, they might be considered *outsiders*, as they might not have enough time to get acquainted with the client organization. Sometimes, when a transformation lasts for a long period of time, they can become *insiders* and develop a long-term relationship with the client.

Usually, clients turn to transformation partners in times of challenging transformations, especially DTs, and when they sense that the transformation is about to fail or is not progressing at all. Consultants, in their role as transformation partners, often take over the position of the project leader and start solving the problems that hinder the client from succeeding. As mentioned in the literature, they can help the client to see the 'bigger picture' (Werr & Styhre, 2002) and offer solutions to support the organization's long-term future (Kitay & Wright, 2007). At the same time, their experience, their project management skills, and the ability to adapt to ever-changing circumstances allow transformation partners to 'think outside the box' in order to guide clients and tailor solutions according to their needs (Kitay & Wright, 2007).

Specialist

While the literature mainly uses the term *expert*, the interviewed consultants seem to apply the term *specialist*. We argue that those terms can be used interchangeably based on EY consultants' claims to possess deep expert knowledge in certain solutions or industries (Mosonyi et al., 2020). "Producing people and knowledge" is seen as one of EY's strongest values and selling points (Consultant 9), which coincides with the functionalist view of management consultancy where knowledge is seen as the hallmark of the industry (Richter & Niewiem, 2009, p. 275). The specialist status qualifies EY consultants to bring their knowledge to the client organizations, in line with Hargadon and Sutton (1997), who claim that consultants as external resources bring knowledge from where it is known to where it is lacking. Other similarities are the given importance to functional or industry knowledge (Richter & Niewiem, 2009; Fincham et al., 2008), the more transactional nature of the service, and the reference to an I-shape profile (Cederberg et al., 2019).

What is specific for DT projects here is that most of the expert roles mentioned by the consultants relate to the theme of data governance and data architecture (such as "Data Strategists"). Becoming data-driven was mentioned as one of the most common goals of a DT project which further increases the importance of including data experts in these transformations. This finding coincides with claims from scholars that data and technical skills will become more important and that IT-driven consulting with technology-based analytics will increase (Crișan & Marincean, 2023; Christensen et al., 2013). On the other hand, some scholars have argued that expertise, as well as the role of providing knowledge, decreases in relevance, as knowledge is now more easily accessible (Vladimirovich, 2022; Christensen et al., 2013). In DT projects, the specialist is often only consulted when needed and for rather specific problem areas, which reduces the total time they spend on single projects. Hence, the role specialist, in contrast to the transformation partner, is not the most prominent and crucial role for DTs.

Generalist

In rather complex DT projects, having an *expert* profile with deep technical knowledge is often not enough, as consultants are required to apply a broad skill set and take on broader responsibilities. Another reason why T-shape profiles instead of I-shape profiles are needed is the fact that IT and strategy divisions are so closely interlinked and cannot be separated anymore. Under these circumstances, consultants need to develop their skill set outside of one narrow area of technical expertise and be proficient in different domains. In most cases, it is sufficient to maneuver on a medium level of technical knowledge, that is, a basic understanding of digitalization and its application, as success might be more dependent on other skills, like communication and presentation skills (Ambos & Schlegelmilch, 2009). This resonates with the arguments made by scholars that the ability to procure, sift and extract relevant data is more important than actually possessing knowledge (Crișan & Marincean, 2023) and that cross-disciplinary competencies and experiences are needed when dealing with DT (Krüger & Teuteberg, 2016).

Similarities between the consultancy practice studied here and the literature on generalists are project management or leader activities, which include coordination, supervision, planning, and presentations (Kubr, 2002). Above that, during our interviews, generalists have been described as being especially creative, compared to research which views generalists as offering new perspectives (Jackson, 1980). What has not been included in the generalist's skill set before is the ability to translate. Translating becomes relevant for generalists managing DTs, as they are working cross-disciplinary and cross-organizationally. 'Translating' has been recognized in research and has both been referred to as a common language in the client-consultant relationship and as aligning the understandings of different departments at the client company (von Platen, 2015; Bode et al., 2021). Our findings highlight the importance for consultants working with DT to understand both 'tech language' and 'business language' in order to align and facilitate the communication of all parties involved. As most organizations nowadays have merged 'strategy' and 'IT', generalists have to understand and work creatively with both ends of the spectrum (Clegg et al., 2004). This makes them familiar with multi-contextual knowledge, and they become creative in speaking many languages (von Platen, 2015).

A new role emerging in the context of DT

Spider in the web

Spider in the web is a new role identified in this study that, to our knowledge, has not been mentioned within the management consulting literature. This role entails five important aspects, stakeholder analysis, building an ambassador network, connecting clients, considering company politics, and selling future projects. For all of these activities, consultants aim to build and extend their 'net' both within EY and the client organization, and move like a spider in it.

The first aspect, stakeholder analysis, is important in the context of DTs since it allows the consultants to react to negative attitudes, individual needs, or fears of employees, once they have identified these. This might be needed as resistance towards DTs, and new digital technologies in general, is high. However, it would be illusive of us to claim that stakeholder management is exclusively relevant for DT projects since it can be a cornerstone activity in any project that is prone to resistance and requires extensive networking. Similarly, building an ambassador network is important for internally driving the often long-lasting and cumbersome DTs (Consultant 10) but might have benefits for other transformations as well, such as functioning as a catalyst and ensuring the engagement of the client. Connecting clients, the third element, is relevant for projects other than DTs, as an exchange of experience and discussions might be fruitful for other areas than digitalization as well, and past clients' testimonies are a strategy for consultants to prove the value of their often intangible service (Kitay & Wright, 2007; Werr & Styhre, 2002; Clark & Salaman, 1998b; Furusten, 2013). In the same way, considering company politics might be an important skill and success factor in any type of assignment, as it brings clarity and ensures progress. However, this element might be particularly relevant for DT projects, as these transformations are often large and include a variety of organizational departments that all demonstrate a need for further digitalization. The last element of the role *spider in the web*, which is 'selling' in order to secure future projects, might not be exclusively relevant in the context of DTs, as management consultants usually have to fulfill sales targets. Yet, DTs often involve an assembly of projects that are managed either simultaneously or subsequently, which creates more opportunities to sell than, for example, strategy definition projects.

When comparing the *spider in the web* with other roles, it might be in contrast to the role of *change agent* (Caldwell, 2003) or *change driver,* as *spiders in the web* try to transfer parts of the responsibility of driving change to the client when they build an ambassador network. *Change drivers* as well have to establish relationships with client organization's members, however, what differentiates *spiders in the web* from *change drivers* is that the latter does not seem to be extending their relationships beyond the client organization. Even though *generalists* have been said to network, among many other things (Brandon-Jones et al., 2016), the consultant's general responsibility to network and build relationships has not received the deserved attention from management scholars. The practice of connecting clients with each other, because a past client's success story bears more credibility than a consultant's pitch, hints towards doubts or skepticism on the client side towards the consultant's expertise and value. This skepticism has also been expressed by management scholars, which led to the creation of roles like *guru* or *impression manager* (Clark & Salaman, 1996a, 1998a, 1998b). The activity of 'selling' has been mentioned in the literature before, for example, by Kitay and Wright (2007), who included the activity of selling within their role of a *business person*. The *business person* might feel pressured to establish credibility and sell new assignments, just as the EY consultants feel pressure to reach their sales targets. However, Kitay and Wright (2007) do not describe how selling is considerably facilitated if the consultants have built an extensive network at the client organization. Building a network at the client company enables the consultants to learn about new pain points or business needs that they can react to with a service offering. Additionally, having established contact with managers and building a large network across clients often results in being assigned to new projects and, in turn, valuable credentials. Knowledge, be it either functionalist, specialist, or knowledge based on experience, is less relevant for the *spider in the web* compared to roles like *expert*, *knowledge broker,* or *knowledge integrator*. Instead, relationship-building, as presumed to be fundamental for roles like *trusted advisor* or *(transformation) partner*, builds the essence of the *spider in the web*. Another similarity with *trusted advisors* is the indistinct boundaries between being an *insider* or *outsider*, as *spiders in the web* also alternate between their own and the client's organization. In contrast to the *transformation partner*, which generally enters projects in a later stage when the transformation is stagnating, the *spider in the web* performs its most important activities at the beginning of the project, that is, connecting clients, analyzing stakeholders, and assigning ambassadors. Only 'selling' and 'managing internal politics' are applicable to all project phases.

In summary, we argue that the unique combination of the here-described activities, stakeholder analysis, building an ambassador network, navigating politics, connecting clients, and selling future projects, demands the introduction of a new role, the *spider in the web*. We believe that it is the influence that DT has on consultants, organizations and projects that allowed this role to surface. However, we do not believe that this role is the confirmation of the claim that DTs will lead to a new generation of consultants (Krüger & Teuteberg, 2018, p. 3), but instead, that *spider in the web* is a fit for many projects. We could imagine that this new role is observable in other large-scale transformations which require the establishment of relationships and networks, like sustainability transformations. In addition, other transformations or projects that exhibit the same degree of complexity as well as long-term nature as DTs, for example, leadership or company culture change, might benefit from consultants acting as *spiders in the web*. They can facilitate the change process by building individual and personal relationships with stakeholders and solving their issues with less standardized approaches.

Therefore, it is surprising that this role has not been identified in the many studies and papers on consultants' roles, which we attribute to the unobtrusive and subtle nature of networking. Furthermore, we believe that due to the overwhelming amount of roles attributed to consultants, it is likely that single characteristics of the *spider in the web* might have been overlooked and all five elements outlined here not been recognized as one entity.

Determining factors for taking different roles

There are certain factors that influence which roles consultants take in projects or that make it necessary to switch between different roles. These moderating determinants, as identified by scholars, are organizational arrangements and company size of the consulting firm, changing team constellations during projects and the client's industry (Canato & Giangreco, 2011) as well as the breadth of the professional domain and the consultant's level of experience (Styhre et al., 2010). In accordance with Canato and Giangreco (2011), consultants have the possibility of switching roles between different project phases, depending on the activities they undertake. For example, they could shift from a role with more networking activities at the beginning of the project to a role that requires structuring capabilities in the later stages. Following Styhre et al. (2010), we also found that junior specialists who are still building their competencies within their niche, or SMEs who have a narrower professional domain characterized by less involvement in projects and less contact with clients, are more prone to stay within the boundaries of their specialist role. In contrast, for other roles, such as *spiders in the web* who undertake a lot of networking activities, or *trusted advisors* who are moving on the thin line between *outsider* and *insider*, the tendency to extend to other roles is higher (ibid.).

Our findings have shed light on four other concrete factors, which are the nature of the project or assignment, the client organization's digital maturity, which organizational area the consultant belongs to, as well as their seniority level. The scope of DT, whether it is a rather simple system implementation or a comprehensive transformation journey, dictates which role consultants take. The client's digital maturity is another interesting and new factor, although it might be context-specific for DTs. The level of the client's digital maturity determines whether consultants are going to take a role that encourages the client to explore novel approaches that boost innovation, or work in a more subtle way to change mindsets toward digital solutions. The organizational or competence area is another factor that might constrain the roles consultants can take, illustrated by, in this case, tech consultants who are more inclined to take a specialist role. Yet, organizational areas and their respective tasks do overlap, which allows the consultants to take different roles or switch roles. Additionally, we have identified the consultants' seniority as a moderating factor, where either the accumulation of experience or knowledge can lead to the consultants moving to other roles in the course of their careers than the ones they started out with. However, which transition path they follow in their careers depends on whether the consultants commenced as *specialists* or *generalists*.

The above-mentioned factors explain the fluidity of the boundaries of consultants' roles, how situational specificities determine which roles they take and whether they transition easily among roles (Sturdy et al., 2009; Styhre et al., 2010; Cannato & Giangreco, 2011).

Responding to claims about DT

Comparing our findings with previous research on consultants' roles in DT projects, the consultants have stressed how strategy is tightly coupled with technology nowadays and how much of their work consists of providing technology-based solutions. Their accounts support Christensen et al. (2013) in their standpoint that strategy consulting has shifted to more analytical and IT-driven consulting services and solutions. However, our findings could not confirm the claim made by Nissen and Seifert (2015) that these new IT-focused services lead to less tight social client-consultant relationships. Consultants still stress the importance of having a close and trustful relationship with their clients (Vladimirovich, 2022). Regarding the role of knowledge, we found evidence both for the importance of providing knowledge to the client (Christensen et al., 2013; Glückler & Armbrüster, 2003), which is part of the *specialist* role, as well as for the function of sorting or filtering relevant data (Crișan & Marincean, 2023), which is part of the *generalist's* responsibility.

CONCLUSION

This study has investigated the roles of consultants taken in Digital Transformation projects and responds to the call for more empirical research on the disruptive force of DT. We conclude by arguing that DT does not cause the drastic role shift that has been predicted by scholars (Christensen et al., 2013; Krüger & Teuteberg, 2016), as many previously described roles proved to be still relevant in DTs. With our study, we have broadened the literature on management consultants' roles in three ways:

Firstly, we have been able to show that consultants at the case organization take up to six different roles, which are: *change driver, trusted advisor, transformation partner, generalist, specialist,* and *spider in the web.* We believe these roles to be relevant in other consultancy firms as well. Despite the claim made by Krüger and Teuteberg (2018) that DT asks for a new generation of consultants (p. 3), we have found wide-reaching similarities between the roles defined in the literature and the consultants' own perceptions of their identity and role. However, the roles taken by consultants also indicate new nuances compared to the roles described in the management consultancy literature, such as the role *change driver*, which focuses much more on human elements and mindset changes as part of a change process than the classical role of a *change agent*. Another example is the *generalist* role, which, in the context of DTs, incorporates an aspect of translating between 'business' and 'IT' in their broad skill set. These nuances can be ascribed to the nature of DT projects.

Secondly, we have identified and characterized a new role of management consultants that, to date, has not been recognized by scholars: the *spider in the web*. We have argued for five specific elements that this new role comprises and discussed whether this role might be relevant in contexts other than DTs. We concluded that this new role demonstrates the importance of establishing relationships and networks in DT projects, but we also outlined how the *spider in the web* might be of a meaningful contribution to other transformations and projects.

Thirdly, our study supports other scholars in their claims that consultants are not bound to a single role, that the lines between roles are not clear-cut, and that consultants shift from one role to another. We expand on the moderating factors identified in the literature by pointing out four additional causes that affect or determine when consultants take which role: the nature of the project, digital maturity, organizational area, and seniority.

The study also allows us to reflect upon what practical implications our findings may have for the consulting industry. Consultancy firms might be well-advised to further encourage their consultants to become *spiders in the web* through, for example, specific training to further enhance their networking skills. Additionally, the activity or skill of translating, as part of the generalist role, might become even more relevant in the future, as technologies increasingly drive strategic decisions, and therefore, it could become consultants' competitive advantage. In general, our classification of roles can help explain consultants' behaviors, incite consultants to reflect upon the roles they take, choose them more consciously and to their best advantage, as well as encourage them to engage in a dialogue about different roles with their clients. In a similar way, consultants are encouraged to reflect upon when to switch roles, for example, when organizational arrangements or team structures change. Our findings might also guide client organizations in understanding the scattered consultancy sector and identifying the most suitable kind of support.

A limitation of our study is that we were unable to adopt a longitudinal approach and study the organization for a longer time period. Moreover, our findings are limited to a single organization in only one country, however, we expect them to be relevant across companies and borders. Another limitation is that we have only investigated consultants' roles from a consultant perspective, which is why we encourage future research to examine other points of view, for instance, the client's. Further, we recommend researchers to test our proposition that the new role identified, *spider in the web*, is also relevant in other transformations or projects.

Observational and practice-based studies could explore whether the identified roles are performed in the same way in practice as described by the consultants. In addition, through observational studies, evidence for roles from the critical literature might be found. We also suggest other researchers to study empirically whether consultants might combine roles or create hybrid versions and observe how consultants transition between roles in practice. Interesting to investigate would be which roles consultants are most likely to switch to, depending on their prevailing role.

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