

Interaction between the consultant and client: a two-sided view from the National Library of Switzerland*

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Abstract. Libraries, an important factor in today's information world, are increasingly confronted with new technologies. The use of technology challenges fundamental assumptions on which libraries have operated. The continual aspect of change brings about uncertainty, a situation libraries are not used to. They have to deal with organizational challenges such as restructuring the institutions as well as the establishment of new services for their users.

In the U.S. in particular, consultants have been playing an important role in supporting libraries during this process, whereas in Europe there is no history of library consulting. Only recently some libraries, for example, the National Library of Switzerland, have begun working with consultants. A consultant was hired to assist the library in its evaluation process for an automated library system.

The case study presented here reflects the consulting process from two perspectives, the client's and the consultant's view. Changes in the communication structure within the library as well as the consultant's influence in the decision making are emphasized.

1. Introduction

In 1992, the National Library of Switzerland had put out a request for proposal for an automated library system. The project director in charge of the library's overall reorganization was heading the evaluation team. At that time the library had no computer system, all the work was done manually. Therefore, the librarians had no computer expertise and little knowledge about library systems could be found inhouse.

*Paper accepted at the Consultex China '93: China's 1st World Consultant and Information Services Conference and Exhibition, 25-28 April 1993, Beijing, China.

The library, however, was running a CD-ROM network and had a staff of two for computer support. Yet, these staff members had been hired just before the request for proposal went out, and they had never worked with a library system before. Consequently, the director decided to get the outside assistance of a library consultant to support the library in its evaluation of the bids.

2. Selection criteria for hiring a consultant

Consultants usually are hired by management, staff has no say in the selection process. In our case we were looking at the following areas of competence in a consultant:

- communication skills
- experience with library systems
- work experience at a library.

Based on these considerations, we chose a consultant who had worked with a library systems vendor, had work experience as a librarian, and in addition had teaching experience and the theoretical background of an information scientist.

How do you find a good consultant? In our view, the best relationship can be formed with consultants when you know the experts beforehand. We would not recommend hiring a consultant based on published lists or recommendations only (see also [1,2]). What might have worked well for one library might not work for your institution at all. Where do you find the few experts in Europe? Most often the best way to meet consultants is at library conferences such as the Essen Symposium or meetings of professional organizations such as ASIS (American Society for Information Science) which has a European Chapter that meets regularly during conventions like Online in London or ECLIPS in Amsterdam.

In Europe there are not that many library consultants to choose from to begin with. In addition to their small number, language barriers and above all cultural differences have to be taken into account. Information services consultants are not necessarily the best people to be hired for a library environment. Prior to hiring a consultant for the systems evaluation, the national library had worked with two other consultants. Both assignments were short-termed. One was not further pursued because the consultant's expertise was more in the area of documentation centers, business libraries and other institutions in the information industry. Yet, a national library or, for that matter, any other academic library is quite different from a documentation center. The second consultant was a widely known expert in the field of libraries; unfortunately it was felt that language problems would prevent a successful longer assignment. In a library it might happen that you hire a consultant who does not speak your native language well or not at all. Be aware that communication problems might abound.

In the case of the National Library of Switzerland our consultant was a German native speaker. On our staff, however, we have a number of native French speakers. Working in the Swiss government, staff is required to understand each other's language but everybody speaks his or her native language. Thus, we often have meet-

ings in two languages simultaneously. Although French speaking staff mostly made the effort to speak German with the consultant, whenever conflict arose they naturally tended to go back to French and our consultant was excluded from the discussion.

3. Trust as the basis of interaction

The decision by the library's management to hire a specialized library consultant expresses confidence. Confidence in his professional skills as well as in his ability to communicate problems and possible solutions with staff members.

The consultant sees himself confronted with a wide range of expectations simultaneously. On the one hand there are the managers who expect solutions without any problems and on the other there is staff who hope that the consultant will enrich the discussion and offer solutions to their own specific problems. Overtime, the consultant who was originally regarded as an objective professional gets more and more involved in the library process. He accumulates official information from discussions, meetings, and memos mixed with confidential information provided by staff members.

During this first phase most staff members approach the consultant in an open and friendly way: he or she gets information from everybody who is willing to cooperate. And most of the staff members do cooperate, knowing that the consultant will be at the library for only a limited time. Therefore, he represents no threat to anybody. The professional skills of the consultant are tested by staff and after having passed that "exam" he stands good chances to help effectively in solving problems. For the consultant this phase is very rewarding. Cooperation is decisive.

But the consultant will take part in the library's decision making process. In our case this meant to decide which library system was the best for our purpose. The evaluation was an open procedure for a long time where the definition of precise selection criteria helped. However, during this process interaction in the core group was determined by the system selection staff members had already made secretly.

In this phase the consultant has two jobs: reasoning in a professional manner and preventing conflict which arises caused by the decision about to be taken. Therefore, the real challenge during the second phase is maintaining trust. Staff members try to influence the consultant by confiding in him. The more the situation shifts from trust to confidentiality the bigger the danger of losing the track of professional reasoning. Sympathy towards staff gets mixed up with facts. The problem is obvious: he knows about the preferences of all the different participants in the discussion – in our case the preferences for a particular library system.

To avoid this dilemma everybody should know the others' personal preferences, then the discussion could continue – on a professional level where a discussion about issues is more important than strategical tactics and inhouse library politics.

In a third phase, due to the different interests of the people taking part in the decision making process the consultant faces a shift in trust. When a system is selected some staff members will be disappointed and demotivated because the system they favoured was not chosen. The consultant loses his objectivity since he will be iden-

tified with one of the rivalling groups in the library. Some might still see him as a partner trustworthy for further cooperation. Nevertheless, he has done nothing more than contributed his professional skills and experience to the selection process. The loss of trust is part of decision making. The only possibility to get trust back is to engage staff in discourse and an explanation of his objectives.

To summarize our special case: As long as the consultant stays outside of an organization just analyzing a special situation or problem he will hardly face the tight-rope walk described above. His involvement will be for a short while.

A longer time engagement often results in cooperative relationships with staff. The consultant's behavior in decision making as well as his pointing out the capabilities of particular staff tends to become similar the way staff itself operates: looking carefully for smooth solutions which keep options open for further cooperation.

4. The consultant's power to influence decision-making

4.1. The client's view

There is a great variety of help offered by consultants and the roles they will play in an institution is divers. Therefore it is important for the client to define beforehand what exactly it is he or she will hire the consultant for [4]. Two widely used models are described in the literature: the directive and the nondirective approach [3].

According to the outline given above we wanted the consultant to take on a directive approach and act as an advisor and advocate. We were well aware of the fact that this would put us in a dependent situation. However, we also defined his role to be an educator to staff. In acting out these two roles he was to become a very helpful assistance for our project. He guided the library through a process it had never experienced before. To evaluate library systems was new to almost everybody on the project. Thus, there was a lot of insecurity, anxiousness, as well as excitement. The consultant not only had to be accepted by the librarians but also by our computer scientist who at first must have seen him as a competitor in his own field. Here, as basically in all the interactions a consultant has with staff, everything depends on his or her personality. Our work has shown that it is absolutely mandatory for a consultant to have professional skills and expertise and at least equally strong personal skills. By this we understand an ability to communicate with people, ask the right questions at the right moment and be sensitive to tensions and changing atmospheres.

Edgar Schein distinguishes between expert consultation and process consultation. He sees the expert consultation to be most effective when a problem is clearly defined and is not likely to recur. By doing process consulting on the other hand the consultant forms a partnership with the client and puts himself in the role of an observer.

Based on our experience of almost one year of regular visits by a consultant the above mentioned clear cut definitions seem to blur. The role of a consultant does change over time, the longer a consultant works with a client the better they get to know each other and soon the consultant may find himself in the role of a staff or

management team member. This might be the time to end the partnership or redefine the consultant's task.

4.2. The consultant's view

It almost goes without saying that the best consultant will be the one who is able to influence a decision without telling people directly what he suggests to do. This refers to the psychological aspects of consulting.

Librarians in Europe do not have a lot of experience with consultants. Only large university libraries, national libraries or large business libraries have budgets to hire consultants. Staff in these organisations work differently. In the private sector people are more used to argue in a straightforward way, they know how to get results in a short period of time. In the public sector this attitude is simply a goal – and only sometimes achieved. Therefore, the consultant has to be prepared for both: asking only questions which help the client to come to a decision or getting himself involved with suggestions and specialized information staff members cannot or are not willing to offer.

The situation at the National Library of Switzerland was special in yet another way. For internal reasons pertaining to the history of the library many staff members had never taken part in decision making. They were hesitant to even making suggestions for change probably due to the fact that in former years decisions had been taken only by the director himself. For instance, prior to the current director's management division head meetings or staff meetings were unknown. Now a new management tries to get staff members involved. Their expertise is seen as an important factor in decision making. This created not only a new role for the staff members but also for the consultant being involved. A lot of convincing and guiding work had to be done in order to assist people coming up with suggestions and get them to express their opinions without fear.

Though his knowledge in automation issues was an important factor for the selection of the consultant, to discuss matters related to the selection of a system and automation issues in general was only a part of his assignment. The other part of the job was getting staff used to thinking in strategical terms. He introduced them to the changes automation will bring to the organization with regards to the internal workload – independently of the library system to be chosen. He reasoned tactical procedures, argued and brought up issues of relevance to the political environment of the library, developed and discussed concepts which could be applied on the national level. And – again and again – he discussed changes in the internal workflow, an area which means the loss of well-established procedures and organizational influence and power. Even if no one will lose his or her job those internal changes have to be seen as a crucial factor. The consultant as a neutral and experienced expert can help the library a lot in changing these procedures because he can initiate changes in the mindset of people. But this takes time.

This is an area where most libraries in Europe have to fight attitudes which were developed over a very long time. Changes will happen slowly. Library management as well as consultants have to realize that real change in attitudes might take years. This might be one reason why experts coming from other disciplines have problems in the area of library consulting.

5. The transformation of a consultant to a quasi staff member

As mentioned above, the consultant's job is always limited in time. He is hired for a special purpose because of his experiences and skills which are not available inside the organisation – in our case the library. The consultant takes on the job because he wants to solve a problem – he is interested in the circumstances and the solution.

It does happen that the consultant's assignment is extended. Most likely this will result in a change of his role: the longer he stays with the library the more he gets looked upon like a staff member. People will get used in having him at the library. This kind of familiarity can help a lot because the consultant is informed and involved in the decision making processes. He functions as prolonged arm of special staff members or management itself. Therefore the support the consultant brings to the library changes. More and more he will be regarded as a normal staff member and a lot of the psychological effects a consultant can have on internal discussions is lost.

In our case there was a lot of work left when the original task of the consultant was done. But this work was work for the librarians to undertake. They had gotten used to having the consultant around, a partner in discussing strategical questions as well as every day problems of the library. Staff became dependent on the consultant.

For the consultant this situation needs to be analyzed: Is his contract extended because of his expertise or because of staff's familiarity with having him at the library? Does he intend to leave the library on his own when there will be too many every day tasks put before him? Should he address this issue or take advantage of the situation by getting paid for a job which could easily be done by a lower paid librarian?

These are questions the consultant should answer himself in order not to lose his integrity but above all they have to be discussed by the library's management.

6. Conclusion

In summing up, the issue of role conflict is a central one for the consultant as well as the client. The client, i.e., the person in the library who hired the consultant, over time will find it more and more difficult to accept the consultant's objectivity. In the case presented here, the client was not objective and had hired the consultant for a dual purpose. One was that she needed professional support she could not find internally in the library. The other reason was to get a consultant to participate and advise during the system selection process and thereby having a person at meetings who was not making a selection based on his own personal interests within the library. Besides the project director (who hired him), he was the only one in the group who had an overview and approached the selection process from an overall perspective. Most librarians were too much involved in the work of their own department. To judge systems applying strategical thinking and long-term planning was not easy for them. Therefore, the decision to hire a consultant for support in this area was a good choice.

Nevertheless, it has to be mentioned that the task was not an easy one for the consultant either. His position from an observer and questioner early on shifted over

time and the more he came to know about the internal conflicts of the library and its staff the more he found himself getting involved and taking sides. Many consultants are familiar with this metamorphosis as one might call it from the mere observer to an almost active staff member. If the client becomes aware of this change he should end the consultant's work or should redefine his or her role. To identify this dilemma can help clients to work with a consultant on a longer term basis. If the client anticipates these problems about expectations and outcomes it will be both rewarding for the consultant and the hiring institution.

References

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