

Creating a more effective consultancy website

Practising what we preach: research with users

In order to inform the redesign of our website we decided to practise what we preach and conduct some user experience research with clients – the principal target users of our website. Here we report the main findings and implications.

What we wanted to find out and how we went about it

We wanted to gain a better understanding of the following three related areas:

- The factors clients consider in selecting a consultancy.
- The decision-making process and information sources involved – including the role of the website within these.
- The information clients are most interested in extracting from the website.

To gather data we conducted in-depth interviews with four clients – the global brand identity manager of a mobile phone company, the UK intranet manager of a leading international bank, the head of ergonomics for a major public service and the director of digital futures at a university-sector college.

Clients want the consultancy to bring new thinking to the problem

Above all consultancies need to communicate that they can bring new thinking to their clients' problems. As one client put it "When I have a slippery problem I'm looking for a different point of view and approach that will lead to a breakthrough".

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Clients assess a consultancy on the basis of its work for other clients, the originality and relevance of its approach, the people who will deliver the thinking and the extent to which the consultancy demonstrates leadership and opinions in its field of expertise.

Cost is important when all else is right, size and location less so

A fixed and limited budget will impose an immutable constraint on the selection of the consultancy and scope of their involvement, but otherwise clients' main concern is in assuring value for money once all else is right.

Size is less relevant than having confidence that the consultancy has the resource, commitment and ability to deliver. As one client put it "If it's a big consultancy you know it's not the person who presents who will do the work. I want to know they have the capability to take on the size of the job but also that they're interested if it's a small job".

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The location of the consultancy was not an issue as long as it was not so remote or inaccessible that it affected servicing or created excessive travel.

Website can be key filter in a process leading to a face-to-face meeting

All four clients described a process starting with the creation of a shortlist and ending with a face-to-face meeting.

Clients base their initial shortlist on their previous experience of working with the consultancy or individuals within it, recommendations from internal or external trusted sources and by remembering someone who spoke at a conference. None of the clients would consider using a search engine although a couple mentioned using industry-specific professional registers. Also no one made a habit of retaining – and therefore being able to use – unsolicited consultancy mailshots.

After creating the shortlist clients described using consultancies' websites to filter down to the small number of companies they wish to meet with – clearly a crucial role for the website.

“For me the website is a crucial link to setting up a meeting; if it looks shabby I won't waste my time and I'll consider others instead”

Website can also be vital in supporting the internal sell

In most cases convincing a client that you are the right consultancy is not enough; they too have to convince an internal budget holder as well. Our clients talked about sending a link either from the home page or from a specific case study to the budget or stakeholder in question. The lesson for consultancies is that even if you have client contacts who know and trust your work you may still need an effective website to ensure you get the contract.

Make clear what you do and demonstrate the ability to bring new thinking

Like most website users clients need the right information fast and will click to a competitor if they can't find it easily. The first thing they need – before reading further – is an overview of the consultancy and the services it offers.

They then want to satisfy themselves that the consultancy does what it says it does and that it does it in a way that will bring the fresh thinking and approach that they are looking for. There were differences among our clients in the degree to which they were interested in the detail of methodologies and the extent to which they trusted testimonials but they all valued case studies highly. Case studies allow clients to see whether and how the consultancy has helped clients with similar problems and demonstrate thinking and approach.

“Case studies are the best way to learn what a consultancy can do for you. I also find it reassuring when they talk about problems encountered and how they were overcome”

Articles and white papers are also important although clients admit they will usually only ever scan them or read the summary. One client described how it was only by being able to forward a PDF of an *FT* article in which we were quoted that she was able to get us a meeting with another key internal stakeholder.

Finally consultancies should consider avoiding having pictures of the consultants as they can be seen as cheesy and should definitely avoid touchy-feely cringe-making biographies!

new experience thanks our clients for their participation in this research.