Identifying the Competencies, Critical Experiences, and Career Paths of I-O Psychologists: Consulting

Alexandra I. Zelin
University of Akron

Joy Oliver
SRA International, Inc.

Samantha Chau
Novo Nordisk Inc.

Bethany Bynum
HumRRO

Gary Carter
PDRI

Mark L. Poteet
Organizational Research & Solutions, Inc.

Dennis Doverspike
University of Akron

Correspondence should be directed to Alexandra I. Zelin, Department of Psychology, College of Arts and Sciences, The University of Akron, Akron, OH 44325-4301

The authors would like to recognize and thank the efforts of previous committee members who contributed to this effort, including but not limited to Michael Trusty and Tracy Kantrowitz.

This article, the third in a series on the SIOP Careers Study, discusses the career paths of those working as external consultants hired to give professional advice to organizations outside of their own organization. We present results from both qualitative subject matter expert (SME) interviews and the quantitative SIOP Careers Study data. The basic consulting career path, including competencies (i.e., a skill developed that is necessary for success on the job) and critical experiences (i.e., on-the-job experiences that define what is required to perform to prepare for the career level), are discussed. For more information on the study’s background, please refer to the TIP Practitioner’s Forum by Zelin, Doverspike, Oliver, Kantrowitz, and Trusty, 2014; the Academia TIP feature article by Zelin, Oliver, Doverspike, Chau, Bynum, and Poteet (2015, January); and the project’s technical report will be posted here when it becomes available.
Qualitative Data: SME Interviews Participants

Seventeen SIOP members who work in the consulting sector were interviewed for this study. The SMEs for 14 of the 17 interviews averaged 19.54 years of experience in the consulting sector, with a range of 8–36 years (years of experience was not available for three of the SMEs). Senior consultant, senior scientist, director, senior director, vice president, partner, and CEO/president/founder represent a selection of the job titles held by participants.

Acknowledging that there are many different sizes, organizational structures, and focuses of consulting organizations, we interviewed SMEs within many different organizational settings. Consulting firms represented included those who were primarily government focused, primarily nongovernment focused, and those which focused on both. With regard to size, the consulting organizations represented in the SME interviews ranged from seven employees to thousands of employees and included a wide range of managerial levels.

Methodology

Similar to the academia data collection (Zelin et al., 2015), structured interviews were conducted to identify competencies and critical experiences necessary for success. See Appendix A for sample questions used during the interview. The initial job-level structure used to examine the career paths contained five levels for competencies and critical experiences to be identified: individual contributor, expert individual contributor, manager, manager of managers, and executive.

Results

Within the consulting sector, we found that regardless of consulting organization, I-O psychologists followed three main job responsibility tracks: project consultant, research consultant, and management. Some consulting organizations combined the research and project career paths such that consultants were responsible for both client-facing and research-based projects, whereas others maintained a separation between the two career paths.

Where there was separation between the two paths, project consultants were mainly responsible for client-facing duties, whereas research consultants often conducted internal-facing work and did not regularly interact with clients. Some project and research consultants chose not to, or were not provided the opportunity to, move into management roles and instead focused on becoming an expert within their particular area or domain. Thus, their career paths included moving from an individual contributor position to an expert individual contributor position. Project consultants who were considered expert individual contributors worked directly with and were responsible for maintaining strong relationships with large, long-term clients. Research consultants, however, became experts within a particular domain (e.g., selection, coaching) and reported working with project consultants on specific client needs.
Other project and research consultants took a management track and followed the career path of individual contributor → manager → manager of managers → executive. For project consultants, this path meant responsibility for creating and maintaining portfolios with clients, building more rapport with clients as they moved up their career ladder, and managing other consultants. For research consultants, this path meant overseeing various research projects and having multiple subordinates.

Participants noted that the size of the consulting firm often dictated the complexity of the management structure. Many of the smaller organizations (fewer than 50 employees) often only had two (project/research consultant and CEO) or three (project/research consultant, manager, CEO) levels. CEOs in the smaller organizations often directly oversaw individual contributors, provided direct feedback, and also had a hand in many of the projects.

The size of the consulting firm also dictated the scope of clientele. Small consulting firms (e.g., approximately 50 or fewer employees) often sold their services locally and throughout a region, midsized firms (e.g., approximately 51–250 employees) increased their sales throughout a region and expanded nationally, whereas large consulting firms (e.g., usually greater than 250 employees) often engaged in global consulting in addition to national, regional, and local consulting projects. As a result, employees of medium- and large-sized consulting firms were typically required to be willing to travel on a regular basis and, in the case of large global consulting firms, may have been presented with opportunities to become an expatriate.

Frequently, project consultants were promoted based on how successful they were interfacing with clients, whether they could independently generate business with new clients, whether they could obtain client referrals, and whether they could expand the services provided to current clients (i.e., offer training services after successfully creating a selection system). The higher one moved up the career ladder within the organization, the larger their client portfolios became. As a consultant’s client portfolio increased, he or she became involved in a wider range or projects in which he or she was the lead or was in charge of assigning someone else to be the lead. Within both the managerial and expert individual contributor tracks it was expected that consultants would bring in new clients and accounts prior to receiving promotions.

In contrast, some organizations noted that their research consultants were more involved with the statistics, analyses, and item/content development and were typically more likely to have a PhD than a master’s degree. Limited information was available for promotion in the research consultant track, but one organization noted that the career-level hierarchy is flatter for research consultants than for project consultants as the work requirements were similar and the primary difference was in the number of subordinates.

SMEs also noted that most consulting organizations primarily promoted employees from within; it became less common
to hire from outside the organization at the manager of managers and executive levels. In some organizations, the manager of managers and executive roles were not filled by I-O psychologists. This often occurred in large organizations, especially government-focused consulting firms, where the services offered were broader than the field of I-O psychology alone.

Having competency in financial management was critical throughout all levels of the organizations, but it was especially important for manager of managers and executive roles. In addition, innovation, creativity, planning, organization, and attention to detail were essential skills to being a successful consultant at all levels. Performance criteria often included the extent to which client needs were met, the extent to which high quality deliverables were produced in a timely manner, number of billable hours, and the demonstration of required competencies.

Quantitative Data: Careers Study Survey

Methodology

The University of Akron’s Center for Organizational Research (COR) graduate students produced a master list of competencies and critical experiences specific to consulting by organizational level from the SME interviews. To facilitate comparisons across levels, survey respondents were asked to rate all competencies and experiences across the consulting sector regardless of their current level (e.g., self-identified individual contributors rated the same competencies as other levels within consulting). For further information about the Careers Study Survey methodology, please see Zelin, Oliver, Doverspike, Chau, Bynum, & Poteet (2015, January) and the project’s technical report posted on the SIOP webpage.

Participants

The SIOP Careers Study included a total of 477 participants who identified as working in consulting and who completed at least a portion of the survey. Participants had an average age of 48 years ($SD = 14.9$ years). Slightly fewer than half (46.6%) of the participants were female, and the majority (89.5%) self-identified as White, with the next highest participant identification being Asian/Pacific Islander (3%). Three participants had previously, or concurrently (see Zelin et al., 2015), worked in academia, and one participant indicated previously working within the industry sector. Approximately 12% of respondents indicated having top-secret government-issued security clearances, and a few participants indicated having additional certifications or licensures, most commonly including certifications from the Society for Human Resource Management. Approximately 80% of participants received their PhD and 20% received their master’s degree.

Results

After analyzing the results from both the qualitative and quantitative data, we determined that the consulting career path model was accurately represented using the five initial job levels following two separate routes: expert individual contributor
or managerial. Oftentimes the decision on which career path to take was dependent on the individual employee, but other times it depended on the organization’s needs and structure. For instance, some organizations did not have the need for someone to take an expert individual contributor position, and thus the individual would need to move into a managerial position to remain with the organization or move to a different organization which offered such a position.

**Competencies**

Information regarding all of the competencies (including mean importance ratings, standard deviations, and information about the career stage in which the competencies were learned) can be found in the technical report. Tables 1 and 2 list the top-10 competencies necessary for success within each of the five job levels and the top-five competencies aggregated across all of the levels, respectively.

Many of the competencies necessary for success as an individual contributor continued to be important when moving up the consulting job ladder. However, there were differences with the competency’s importance ranking across the levels. For instance, written communication was rated by individual contributors as the most important competency for success. However, it dropped to third most important competency at the expert individual contributor and managerial levels, disappeared completely for manager of managers, and reemerged as the ninth most important competency at the executive level.

An interesting trend appeared when analyzing where participants indicated they learned the critical competencies necessary for success at each level. At the earlier stages in their career, participants noted that they learned certain competencies during their graduate school career. However, a greater percentage of participants at higher levels in the organization noted that they learned the same competencies on the job rather than during graduate school. For instance, for oral communication, 62.5% of individual contributors indicated they learned the competency in graduate school versus 18.8% on the job, whereas only 12.5% of managers of managers indicated they learned the competency in graduate school versus 62.5% on the job. Leadership was another example of the trend, as 43.8% of individual contributors indicated developing the competency in graduate school versus 28.1% on the job, whereas no manager of managers reported developing the competency in graduate school, but 87.5% reported developing the leadership competency on the job.
It should be noted that participants rated some of the competencies as learned most often in graduate school across all levels, whereas other competencies were mostly learned on the job. Knowledge of multiple content areas in psychology, data analysis, critical thinking, knowledge of test development, knowledge of validation principles, research skills, and psychometrics were all rated highly as competencies developed in graduate school regardless of level within the organization. Business development, coaching, creating a vision, customer service, decision making, delegation, political savvy, and product knowledge were all rated higher as developed on the job rather than in graduate school or structured training. Overall, most of the participants indicated that the majority of competencies were developed either in graduate school or on the job, whereas very few were learned through structured training.

### Critical Experiences

As with all of the listed competencies, means and standard deviations for all critical experiences can be found in the technical report. Tables 3 and 4 display the top-10 critical experiences for success in consulting at each level, and the top-five critical experiences for success across all levels, respectively.

Although participants rated many of the same critical experiences as important for success across all levels, they noted a few differences in the critical experiences necessary for success across the levels. Employees at the nonmanagement or lower management levels reported that, to be successful, an employee should be able to contribute to multiple projects, work

---

**Table 1**

Top 10 Competencies for Each Level Within Consulting

<table>
<thead>
<tr>
<th>Individual contributor</th>
<th>Expert individual contributor</th>
<th>Manager</th>
<th>Manager of managers</th>
<th>Executive</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Critical thinking**</td>
<td>2. Ethical behavior**</td>
<td>2. Ethical behavior**</td>
<td>2T. Decision making*</td>
<td>2. Trustworthinessb</td>
</tr>
<tr>
<td>4. Interpersonal skills*</td>
<td>4T. Critical thinking*</td>
<td>4T. Interpersonal Skills*</td>
<td>2T. Strategic thinking</td>
<td>4. Ethical behaviorb</td>
</tr>
<tr>
<td>5T. Knowledge of validation principles</td>
<td>4T. Integrity*</td>
<td>4T. Adaptability*</td>
<td>5T. Critical thinking*</td>
<td>5. Interpersonal skills*</td>
</tr>
<tr>
<td>5T. Initiative*</td>
<td>4T. Trustworthinessab</td>
<td>6. Trustworthiness*</td>
<td>5T. Ethical behaviorab</td>
<td>6T. Critical thinking*</td>
</tr>
<tr>
<td>5T. Problem solving*</td>
<td>7. Interpersonal skills*</td>
<td>7T. Customer Service</td>
<td>7T. Prioritization</td>
<td>6T. Initiative*</td>
</tr>
</tbody>
</table>

Note: * indicates same means. Superscripts reflect potential mean differences for the same competencies across levels. The same competency across levels sharing the same superscript had means that did not differ from one another (e.g., Communication: Written compared across individual contributor, expert individual contributor, manager, manager of managers, and executive). The same competency across levels with a different superscript reflected a significant mean difference (e.g., trustworthiness between executive and manager differed; trustworthiness for expert individual contributor did not differ from manager or executive as it shares the same superscript with both).

**Table 2**

Top-Five Consulting Competencies Across Levels

<table>
<thead>
<tr>
<th>Overall top-five competencies</th>
<th>M</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Communication: Verbal</td>
<td>4.65</td>
<td>0.59</td>
</tr>
<tr>
<td>2. Ethical behavior</td>
<td>4.58</td>
<td>0.66</td>
</tr>
<tr>
<td>3. Critical thinking</td>
<td>4.57</td>
<td>0.60</td>
</tr>
<tr>
<td>4. Integrity</td>
<td>4.56</td>
<td>0.65</td>
</tr>
<tr>
<td>5. Trustworthiness</td>
<td>4.54</td>
<td>0.65</td>
</tr>
</tbody>
</table>
independently with minimal supervision, follow timelines and budgets, and assist on project delivery. As an employee was promoted to higher managerial levels, his/her ability to work directly with clients, effectively allocate resources, and expand and maintain his/her client contacts was increasingly important for success.

**Final Career Path Models and Future Directions**

Interview and Careers Study Survey results indicated that five levels best capture consulting careers: individual contributor, expert individual contributor, manager, manager of managers, and executive. Often, individuals within the consulting sector can choose whether to take a management track or an expert individual contributor track, frequently based on their career goals and/or individual capabilities. However, this choice can also be limited by an organization’s hierarchical structure and current positions available. Of the top-10 competencies across career levels, most of the competencies an individual contributor needed to master for success were found throughout all levels, with the differences appearing in rank of importance at different levels. In contrast, although some of the top-10 experiences were similar across levels, others showed marked differences. Employees in individual contributor and lower management levels suggested that one needs to contribute to multiple projects and work independently for success, whereas employees in higher managerial positions were expected to work directly with clients and expand and maintain their client contacts for success.

These findings on consultant career paths have implications on the education of consultants by graduate schools, employers, and professional organizations. The relative importance of competencies, and where they were learned, differed somewhat across job levels. Specifically, experience on the job appeared to take on increased importance for development as one moves to higher-level jobs throughout his/her career. The emphasis placed on on-the-job experience for development reinforces the importance for consulting firms to identify and provide purposeful assignments and experiences that help grow their consultants’ capabilities. At the same time, this finding may also highlight the benefit of graduate programs helping students to find practical experiences that they can utilize to start developing consulting skills that are not the traditional focus of graduate school training.

The extent that formal and structured development opportunities could be leveraged even more to help consultants gain the skills needed for broader, higher job levels may also be worth consideration. Specifically, as skills such as business development, delegation, coaching, creating a vision, and decision making were reported to be learned more on the job, there may be opportunities for consulting firms, academic institutions, and professional organizations to identify opportunities for structured training or continuing education activities for I-O psychologists to develop these consulting skills and for I-O psychologists to take advantage of these opportunities. The upcoming preconference workshops at the 2015 SIOP Annual Conference entitled, “Half-Day MBA: Sharpen
Your Business Acumen” and “Coaching for Change: Practical Tools for I-O Psychologists” are examples of such structured learning opportunities.

Results from the study can help students and early career individuals decide whether a career path in consulting is a good fit for them, and, if so, which career paths within consulting are most attractive. We suggest examining the profile of critical competencies by position and level while realistically assessing one’s own competency profile and interests. In addition, lifestyle preferences

Note: T indicates same means. Superscripts indicate mean differences, if any, for the same experiences that appeared across the levels (e.g., Mean ratings for “Maintain composure under pressure” compared across individual contributor, expert individual contributor, manager, and executive did not differ from one another as they share the same superscript). The same experiences across levels with a different superscript reflected a significant mean difference (e.g., Means ratings for “Develops relationships with client contacts” differed between executive and expert individual contributor as they had different superscripts).
and career aspirations should be considered when selecting the specific firms at which to seek employment. There are a multitude of successful consulting organizations within the United States, and they vary widely on a plethora of dimensions that drive the work experience. These dimensions include, for example, number of employees, areas of focus, travel requirements, and managerial structure. SMEs suggest that one should consider their ultimate career goals before deciding on the organizations to which to apply. For instance, is national or international travel of interest? If yes, perhaps selecting a larger organization with locations across the United States and in other countries would be a better fit than an organization that works with local businesses. How hierarchically flat or tall an organization’s managerial structure is can also impact whether an individual can advance in expert individual contributor roles and/or in managerial positions. Thus, if becoming an expert individual contributor is an ultimate career goal, it would be in the interest of the individual to seek out employment opportunities that offer those positions.

This study provides insight into the competencies necessary for success at various levels within the consulting sector. Our study also offers direction to academic institutions, consulting firms, and professional organizations such as SIOP on critical experiences and structured training programs to help prepare consultants for the next step in their careers. As with the other three sectors, we recognize that the current study only captures basic career path moves for consulting as a whole. Future researchers may want to expand on this study to examine if career paths and competencies required for success vary across different types (e.g., size, government vs. nongovernment) of consulting organizations.

References
