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Friend or Facilitator: Navigating Grey Zones in Consulting

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Abstract

This article explores a real-life ethical dilemma faced by a consultant early in his career, where a personal bond with a challenging client helped save a high-stakes project. Using this case, the paper examines ethical decision-making through the lenses of virtue ethics and consequentialism, questioning whether strategic rapport can remain morally sound. Drawing from literature and consulting codes of conduct, the article concludes with practical insights for current practitioners and a call for more concrete case-based training to guide consultants through the complex realities of ethical judgment in the field.

Introduction

One persistent challenge in consulting is navigating relationships with difficult stakeholders, be they colleagues, team members, or clients. While often dismissed as interpersonal friction, these moments can quickly evolve into ethically complex terrain - especially when reputations, deliverables, and livelihoods are on the line.

In today's workplace, consultants are expected to navigate such tensions under the guidance of codes of conduct. Yet, these codes are frequently criticised for being vague, overly broad, or detached from real-life dilemmas (Allen & Davis, 1993, p. 456; Webley & Werner, 2008, p. 412). When the rules fall short, consultants are left to interpret right from wrong on their own.

This essay explores a real case from the early career of "Bram" (pseudonym), who faced a challenging client and an even harder ethical decision. The case emerged from a one-hour interview using Bouwmeester's (2023) jokes-based method, guided by three illustrated cartoons designed to elicit ethical reflection and lived experience. Through Brams' story, the paper delves into virtue ethics and consequentialist thinking, offering insights into the ethical balancing act many consultants quietly perform. Finally, it offers practical tips for practitioners who one day find themselves in a similar situation - because in consulting, it's not a matter of if, but when.

The Case

Imagine oneself stepping into an international project for the first time, arriving in the bustling US headquarters of a global food giant. As a consultant for a big 4 consulting firm, your mission is clear yet daunting: implement their new ERP system. Frequent travels and interactions with the client's IT department define your daily rhythm, but it's a note from your relocating predecessor that sets an uneasy tone: "Mike (pseudonym), the main IT guy, has consultants for lunch - watch out." (p.c. interviewee).

Upon confirming with project partners, your apprehension deepens. Mike indeed has a reputation - he is demanding and known to hold projects hostage by withholding critical approvals based solely on personal whims. His power over the project's success is unquestionable while his abuse of authority and "narcissistic" (p.c. interviewee) traits quickly become evident. Your initial meeting feels like a tense, sizing-up contest, testing your resolve. Despite Mike's arbitrary power plays, he approves your continued presence on the project, recognizing you as someone who can "stand his ground" (p.c. interviewee).

As months pass, you increasingly find yourself in a delicate middleman position, colleagues pleading for your assistance in influencing Mike's decisions. Navigating this tightrope of diplomacy sharpens your interpersonal skills, slowly letting down Mike's guard. The professional relationship evolves; casual drinks, dinners at his home, and shared moments gradually transform the once hostile dynamic into mutual trust.

Over the two-year timeline of the project, this professional camaraderie deepens. You become Mike's trusted confidant, coaching him privately, helping strategize important meetings, and providing candid feedback to improve team dynamics and project efficiency. "I think you might be my best friend," Mike confides sincerely, unaware that your intentions - though honourable - primarily focus on safeguarding the project's progression rather than purely personal bonds.

Bram’s ethical dilemma - faced early in his consulting career, though extreme, is one familiar to many practitioners: Is it right to strategically leverage personal rapport to manage a difficult client? His indirect approach, aimed at securing project success, raises questions about the ethics of influence through personal connection. Rather than casting judgment, this section has set the stage for exploring the ethical complexities at play. The next section draws on relevant literature to examine arguments - both for and against Bram’s actions, inviting readers to reflect and reach their own conclusions.

When Friendship Becomes a Strategy

Bram’s decision to cultivate a personal bond with Mike raises questions central to business ethics. In the consulting world, personal rapport is often seen as pragmatic stakeholder management (Shaw, 2019, p. 22). Relationship-building aligns with relational ethics, where care and empathy play a role in effective collaboration (Engster, 2007 p. 28; Kwan, n.d.). Yet, this instrumental use of friendship challenges Michael Sandel’s (2012) warning that certain moral goods - like friendship - are diminished when turned into strategic tools. The risk lies in instrumentalizing relationships for business outcomes, blurring the line between professional integrity and personal manipulation.

Consulting codes, like EY’s (2024), warn against any action that could compromise objectivity or the perception of independence. Bram’s relationship with Mike also illustrates a deeper tension within care ethics: professional responsibilities often emerge from empathy and human connection (Engster, 2007, p. 28). However, such closeness can blur ethical lines, requiring consultants to remain mindful of when care shifts into compromise. While Bram’s approach yielded results, it raises a key question: does strategy dilute sincerity, or can trust-based collaboration be both ethical and effective?

Virtue in the Gray Zone

Bram’s case inhabits an ethical grey zone, ideal for virtue ethics analysis. Rather than ask what rules he followed (or broke), we ask: what kind of person is Bram striving to be? In a favourable light, his actions reflect virtues like practical wisdom, courage, and goodwill. His choice to engage Mike constructively could reflect Aristotle’s phronesis - finding a middle path to deal with a difficult stakeholder without alienating him (Aristotle, trans. 2009, p. 34). Consultants, as Schein (1997, 1999) notes, sometimes form alliances if it benefits the client system, suggesting rapport can coexist with virtue. A personal alliance may be compatible with virtue, so long as it serves the broader good.

However, too much closeness risks favouritism or a loss of objectivity, which contradicts the values of honesty and fairness. This aligns with Sandel’s (2012) caution that ethical behaviour cannot be fully codified - it depends on human motivations and judgment. If consultants become too personally invested, can they still make difficult decisions, such as reporting underperformance or recommending a replacement? Virtue ethics stresses that intentions matter: doing the right thing, for the right reasons, in the right way (Sandel, 2009). For consultants, this means balancing empathy with professional independence. Achieving this balance is difficult, which is why cultivating virtue and ethical discernment is essential. Bram's case ultimately illustrates the complexity of real-world ethics, where care, professionalism, and integrity often coexist in tension, not always in harmony.

The Consequentialist Consultant

Utilitarianism emphasizes outcomes (Mill, 1863) wherein this case, Bram's mediation of the environment around Mike rescued a faltering long-term ERP implementation. The project's success benefited many: the client company received a functional system, employees avoided the chaos of failure, Bram's firm protected its reputation, and even Mike may have grown professionally. If the positive consequences (e.g., value delivered, stakeholder satisfaction) outweigh the negatives, a consequentialist might endorse Bram's tactics as 'the ends justify the means.' (Harvard University, 2009).

However, this pragmatic view must consider long-term effects. If consultants routinely blur boundaries to gain cooperation, trust in their objectivity may erode (Kaptein & Schwartz, 2008). Codes from Deloitte (2023) and KPMG (2020) stress that actions must uphold both perceived and actual independence. This highlights that ethical conduct isn't only about what is done, but how it is seen - if a consultant's closeness to a client gives others reason to doubt their objectivity, the damage to trust may be just as significant as an actual breach. Habitual bending of ethical lines - even when effective - risks normalizing behaviour that weakens professional integrity across the industry. PwC's 2024 code, for example, states the firm is "willing to walk away from engagements" if objectivity or integrity is at risk. This reflects a deontological limit to consequentialism: some means are off-limits, regardless of benefit. Thus, while Bram's approach worked, consequentialism urges us to ask: what if everyone did the same? The answer underscores the tension between outcomes and principles.

Guide for Practitioners

Now at the end of a successful multi-decade career, Bram offers two takeaways to help consultants navigate morally ambiguous situations.

First, he stresses the importance of having a trusted confidant - ideally someone outside your competitive space - who can serve as a sounding board. This person can offer an external, unbiased perspective that challenges assumptions and brings clarity in emotionally charged or ethically grey moments.

Second, Bram advises picking your battles wisely. Before stepping into a difficult situation, consider whether it falls within your scope of responsibility or influence, and whether it truly demands your involvement. Not every wrong needs to be righted by you personally, especially if it's outside your remit or risks outweigh the potential impact. Instead, assess the stakes: is this issue significant enough - professionally or ethically - for you to act? This balance of reflection and pragmatism, he suggests, is key to managing complex ethical terrain without burnout or overreach.

Revision to Code of Conducts

This case is but one example of the many ethical dilemmas consultants regularly face in the course of their work - complex, high-stakes situations where the right path isn't always clearly marked. While consulting firms uphold codes of conduct that outline core values such as integrity, objectivity, and professionalism, these documents often remain broad and abstract. What they frequently lack are detailed, real-life examples of how those values are challenged in practice, leaving consultants to interpret the ethical boundaries themselves. This may be by design, placing the onus on individuals to assess whether wrongdoing has occurred and to decide what actions to take. However, for firms truly committed to fostering ethical behaviour, more can and should be done.

I call on consulting firms to incorporate authentic case studies - drawn from the lived experiences of retired consultants - into their ethics training and internal guidance. These anonymized narratives, where necessary, can give practitioners a clearer sense of how ethical dilemmas emerge and how the firm expects them to be addressed. Such transparency not only builds ethical awareness but empowers consultants with the confidence and moral clarity to act when it matters. Not every scenario needs to be public, but within internal structures, firms can foster a stronger, shared understanding of what ethical conduct looks like when theory meets reality.

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