

Working with the Client Consultant Relationship: Why Every Step is an “Intervention”

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Abstract

This paper challenges the notion that organisational consulting proceeds through a sequence of set steps, namely: entry, contracting, data gathering and diagnosis, feedback, intervention, and evaluation. It also suggests that much work done in the name of these classic action research steps is really more about selling than exploring options in the service of the client. It offers an alternative view of consulting which places greater importance on working in the here and now of the client consultant relationship itself.

The work of an OD consultant is often presented a series of planned stages: entry, contracting, data gathering and diagnosis, feedback, intervention and evaluation (French, W.L. & Bell, C.H.) with discrete tasks all directed outward, at the problem. There is an assumption that the client knows what the problem is and that the consultant, “collaboratively” with the client, will address these problems and fix them. However my experience of working with clients is not like that at all, largely I think, because of three things:

- I work in the here and now, ie, I work with what ever is going on,(I don’t just direct my attention to the content of a problem being outlined by the client, nor do I confine myself to the client’s definition of the problem) ;
- I work with the client consultant relationship itself – with the dynamics of our relationship, with what’s going on between us;
- I don’t work in a linear sequence of discrete steps which imply for example that contracting happens in the beginning, that both client and consultant are clear what the problem is, that interventions happen after data gathering and diagnosis etc. etc.

It seems to me that sometimes OD consultants can hide behind the rhetoric of planned change and action research when indeed their modus operandi is closer to that of the salesman. Why might they do this?

Consulting is an anxiety producing profession. Faced with what can seem like an overwhelming problem in the client organization, plus their own need to perform and succeed, it’s no wonder consultants use the bravado of the expert and salesman as a defense against feelings of not really knowing what to do and perhaps even feeling a fraud. Consultants get caught in the sales dynamic because they are anxious, because they don’t trust their own instincts, because they fear losing the client, because they have little self insight and are frightened, embarrassed, or even unaware of their own feelings, because they want to be seen as rational and in control. They want to be the “Masters of Knowing”. In trying to avoid

these feelings at all costs, consultants can easily fall into the trap of Looking Good- their sales pitch is smooth and reassuring, yes, they've encountered this situation before and yes they know just what to do to fix it. When this happens they are at risk of colluding with client solutions to avoid a myriad of uncomfortable or difficult feelings on the part of both themselves and the client. The consequence may be that the real, or underlying client problems are rarely confronted and worked through.

To explain more, and to perhaps begin to outline an alternative way of working, I'd like to go through the traditional consulting steps and challenge what often happens in the name of those steps.

Entry

Whilst entry in the pure OD sense is about entering the client system, I think that for many consultants it's about getting a foot in the door and selling. At the entry stage, the client tells you something about the problem, and is trying to work out whether you are the right consultant. Consultants want to look good at this stage and inspire confidence. Even though this stage often occurs over the phone, consultants, through their best paraphrasing skills, can try to convey a sense that they have a good handle on the problem. Clients, often anxious themselves, need reassurance and often venture a few interview type questions seeking to ascertain the consultant's credibility, experience and credentials. This plays right into a collusive dynamic where the anxiety of both is alleviated: the consultant gives a confident, "I can handle it" answer (and hopefully scores the job) and the client, relieved, gets a saviour.

This however, is an opportunity lost. Every contact with the client should be an opportunity to gather data, make a diagnosis on the run, and start to work. How is the client sounding on the phone? Do they sound distracted, anxious, smug? Do they sound as though they have no part in the problem? How do they talk about the problem – is their description clinical, detached, is it all over the place, panicked? How committed are they - are they prepared to make a time to talk in person about the problems they are facing?

As a consultant, you can start to work with any of this data. You can intervene; make observations on what you're hearing. You can talk about how hearing about the problem and talking with them makes you feel. You can also start to feedback your impressions of the situation or their part in it. You can raise issues that you sense have a bearing on the problem but have not been raised so far in the discussion - perhaps asking about players and relationships not yet mentioned for example asking about the relationship the client has with her boss or her colleagues etc. Take a risk and follow your hunches. Finally, you can try and get a sense of whether you want to and can, work with this client. If you do, then you ask for a face to face meeting. What you're really doing is contracting for some more space in which to explore the problem.

Contracting

Contracting for me is always about getting a big enough space in which to work. I need to get my own sense of what the problem really is. However in the way I often see contracting

described it is actually about putting forward a fairly detailed, well documented proposal of activities and interventions and getting the client to sign on the dotted line.

Contracting in this sense is about scoping a project and making sure the client will go along with you, it's a security blanket for consultants, and it holds warm a fantasy that you and the client agree, that you have client support that they'll keep paying and hopefully not resisting. The term contracting has a kind of legal feel to it in the spelling out of obligations and responsibilities...and like that other contracted relationship, marriage, a hope of safety and ever after.

But you can't contract for love. And you can't contract for what you have no idea will happen. This is why contracting can only be about space to work, and a commitment to stay with it when things get difficult. And even then, you'll need to recontract, for contracting and recontracting happens at every stage of the consultancy – it never stops.

An important step to make sure you do in contracting is intervening. Yet how can you be up to "intervention" when you haven't even completed data gathering, diagnosis, feedback and planning for change?! Well, you actually have a heap of data already in the way the organisation contacted you, the way you were able to access entry, and your experience of the client so far. So often, and I would dare to venture, *every time*, those things that went really wrong with a consultancy later down the track, were occurring right there at the start. Those first couple of interactions with a client and their organisation offer a wealth of data: the way you experience the client may well be the way others experience him/her. Clues for understanding the client's contribution to the problem lie right there under your nose, or under your skin...is the client getting to you with her sense of self importance and "busyness?" Does the client seem so overly in charge and impressive that you feel intimidated and are asking yourself hey, why did he ask me in if he's got it all under control? Ignore this data at your peril. This is where feedback, an intervention in itself, comes in.

Start to work with the client then and there, offering gentle feedback and some interpretations. "I'm struck by how busy and speedy you seem, and how tightly you've narrowed down the problem...it's like you just want this fixed so you can go onto more important things". Tell the client what working with you will be like, and work with the response: "Look, working with me will be like this, I will be straight with you and share my reactions to what's going on and how I feel we're working...starting to work on this problem may well open up other issues and we may go slower not faster, things may well get worse for a while, not better.."

If contracting is about getting clear on how you will work, the best way for the client to see this and understand it is in the here and now of your working with them on the spot. If you and the client can get through this, it will build your resilience to feedback and strengthen your relationship. Later on down the track when you're really working with resistance- you'll need it, ie you'll need a strong collaborative relationship that can withstand some straight talking. If the client doesn't buy it, well, you've saved yourself problems later on. Sometimes I build in a rest break or thinking time. Even if the client wants to commit, I say, let's wait a few days to give us time to think about it. Staggering the entry/contracting process can be useful in gaining

commitment, in negotiating the relationship and in beginning to work with the resistance which will always be there.

Data Gathering and Diagnosis

Data gathering and diagnosis is seen as a discrete phase often using particular tools and generating specific products or outcomes. Often however they are little more than a pre-sales warm up generating predictable training “solutions”. Also, there may be an over reliance on impressive tools and instrumentation (which cost more and require time to score and analyse) when a more low tech anthropological approach may yield excellent results.

Data gathering and diagnosis are not neutral, scientific activities. They can in fact be more powerful intervention strategies than anything in your consultant’s toolbox. Instead of just “interviewing” organisation members, **work** with them as well. Address issues as they arise. Keep contracting, telling them how you work, and that you will share your thoughts with them along the way. It is in this phase of the consulting process that working transparently and collaboratively really has impact. Talk with people about what is emerging from your exploration of the issues, give and get feedback on what you are experiencing. Don’t just leech information from them, put yourself on the line and *give* something. After all, your assessment, your opinion is your value added – that’s why you’re the consultant! Encourage them to talk with their colleagues, offer time to talk with you again or involve others in resolution of conflicts or issues with your assistance. Get the managers involved, feeding back to them constantly.

Feeding back does not mean being the messenger or doing others’ work for them. It means working with the manager/client on issues emerging, coaching and supporting them to confront and work through emerging issues. It means creating spaces in the middle of the consultancy when different parties are brought together to address enduring and sometimes previously undiscussable problems. In this sense then, the “data gathering and diagnosis” phase is when the heat gets turned up and problems are surfaced and experienced more acutely. This is the part where things get worse, not better, as Pandora’s Box reveals its terrors. This is also why the more confronting you’ve been earlier on in really being straight with the client and building the relationship, pays off. For when it comes to feeding back your analysis, there should be no surprises – you’ve been talking and working with them on this all along.

Feedback

This stage is sometimes run as a show and tell “presentation” to the client where consultants can demonstrate the astuteness of their skills and the accuracy of their instrumentation. Consultants often get nervous at this stage, a kind of stage fright which is understandable if you are in performance mode, up front, “presenting” rather than grounded in your own sense of yourself and who you really are. Working as a consultant you need to have a sense of personal authority (Gould, 1993) in that your feelings, needs and thoughts are able to be acknowledged and brought to the consulting encounter. This means that the consultant feels

entitled to have and bring to the work their own feelings. This is linked to the notion of “bringing who you are to what you do” (Bellman, 1990). A consultant is not just a cardboard cut out playing a role but is able to bring who she is, and all that she is into that role. In this sense you are not “performing” – you are being you and saying it as you see it.

Consultants get nervous about resistance or worry that their results are not spectacular enough because they confirm what everybody knew anyway. Yet feedback should never solely be delivered in one “presentation” – it should have been happening all along the way, there should be no surprises, only continuous re-contracting and further interventions.

If your investigations have shown that, for example, staff are weak in areas of performance evaluation and management, then ask where does that come from? Work with the senior managers in feedback meetings around their own skills and relationships with their own bosses and staff. If the data shows a lack of openness and willingness to confront conflict, work with that in the meeting itself and their neutral or luke warm response to the feedback. The purpose of feedback meetings should always be to bring the responsibility right back to where it belongs. This needs to be done in a strong and supportive way, not as a blaming exercise. Generating some real work in these meetings and addressing some difficult issues in the here and now can be very energising and releasing for a management group.

Feedback should be about managers facing their dragons and actually working with them; it should generate a dynamic of empowerment not an “audience” response of applause and approval for the consultant’s “results”. The feedback meetings need to be focused very close to home and not quickly directed outward towards a package of solutions up the consultant’s sleeve. Working with resistance is a critical task of the feedback meeting.

Intervention

This phase is usually written about as the outcome of a planned change process and is represented as “the solution” which is to be implemented. Often it represents the consultant’s “product”, (eg a training package) and in fact has often been pre-empted or presold ie “contracted” for right at the start of the consultancy – that’s why it’s the result of a “planned” change.

However the most powerful change can come from an awareness of **dysfunction in existing relationships**, and an enhanced capacity to take up one’s responsibilities more strongly. Sometimes the most radical change comes *not* from replacing something with some new process or people, but rather, *from standing still and working with what’s right under the client’s nose*. By this I mean working with what’s there currently: the conflicts, the undiscussables, and the game playing. Powerful change occurs as a result of enhanced understanding and insight into the nature of group and organisational level dynamics.

Having an understanding of the unconscious dynamics that are played out in organizations is an important aspect of the consultant's repertoire. A psychodynamic approach frees people up to explore the less rational aspects of organisational life in a way which acknowledges the hard to talk about tensions in organisations for example around power, dependence, shame, authority, sex, gender, aggression, love, envy, competition and scapegoating.

It means that you can work with clients on for example, how this group seems to work like a family with an absent father and abandoned children, or like a group of martyred women competing with each other for most victimized status etc. For me working as a consultant with organisations it is just not that useful to see organisations only as rational, goal driven, problem solving entities and then to berate them for not being more so. I have found that using an approach which acknowledges the other, less visible, but arguably more powerful unconscious forces in organisations is both more forgiving, provides different options and is more reparative.

By incorporating this approach in an understanding of how organisations work I am not only addressing the pathological in organisations. Nor am I using the approach to look only at individuals, for indeed this approach enhances our understanding of organisations at the group, inter-group and organisation as a whole levels, providing a deeper understanding of many features of organisations, even those that appear straight forward and ordinary. In fact that can be its biggest strength – helping us understand why ordinary things surprise us when they work, or frustrate us when they clearly should work, because everyone agreed they would, but in fact, they didn't.

Instead what I often see consultants doing is pitching too many "interventions" at the rational, individual skill level ie, "it's because you don't have the skills/knowledge on performance management that we have this problem and so we will teach you". New products, like training, 360 degree feedback inventories, job analysis etc are easier to identify and talk about as interventions than the current dynamics, processes and relationships.

Finally I want to say that the main intervention can in fact be you, the consultant, and the way you work in the client consultant relationship. The Client Consultant Relationship is the place where working in role and emotions come to the fore. It is often in the relationship between the client and consultant that the same problems and dynamics plaguing the client get played out in the relationship between them (Bain, 1976; Czander, 1993). This is no coincidence; the client represents part of the problem. This is not to say of course that training and other "product" solutions cannot make a valuable contribution to the change effort but rather that their success is dependent on a less tangible process of change that is to do with the existing nature of relationships and organisational dynamics themselves.

Evaluation

Whilst on the one hand it makes sense to have an evaluation phase at the close of a consultancy, how often is it characterised by a final show and tell in which consultants can show they've addressed the problem and which also provides an excellent opportunity to on

sell? Just who is the evaluation in the service of? Sometimes, an evaluation is used as a closing off and termination device, with a good dash of **Public Relations** thrown in.

Informally, evaluation should have been going on all along, especially if the consultant has been using an action research frame to the work. It should become evident, through the collaboration between client and consultant, when enough is enough, when sufficient progress has been made. Just as a staggered entry and contracting process is useful in the beginning of the consultancy, so too is a staggered ending. A series of final interventions emerge naturally as successes can be acknowledged and celebrated. Where things aren't going well, there can be a recontracting process, or a built in time out or trial period. Like all relationships, there are many ways to leave and make an ending or a new start. Transfer of learning is not a separate phase when working in this way. Client learning has been occurring all along, with the evaluation phase really representing collaborative reflection on the work you've been doing together. Transfer is thus embedded in the client system which is better equipped to deal with problems in the future.

Conclusion

Organisational consulting is a complex and dynamic process. Trying to understand what's really going on can be a challenge, however having the courage to work with it is an even greater one. Too often we as consultants don't trust our own instincts or are too fearful of losing the client. Other times, we are afraid to address the emotional aspects of the work and relationship, fearing we won't be seen as rational, objective and credible. (Beeby, M. et al 1998) Yet these dynamics are integral to our understanding of what is going on in the consultancy and we ignore them at our peril. (Stapley, D.F. 1996, Hirschhorn, L. 1990) We forget that we are in fact ourselves the best consulting instrument and that in bringing ourselves fully to the client consultant relationship, we are in the true service of the client. The Client Consultant Relationship provides an excellent vehicle for understanding what's going on in the consultancy, but it's often the last place we want to look.

This way of working means two things. It creates a client-consultant relationship which is intense and intimate, one in which both client and consultant see each other, and experience each other fully as whole people. But it also means that the consultant's role may mean at times that you have the courage to tell the emperor he had no clothes. Working strongly and fearlessly in role, with personal authority, is how you add value and avoid the kind of dereliction of duty seen most starkly in the recent sagas of corporate collapses (Enron, HIH) in which consultants absolute collusion meant they "yielded to their clients in virtually every instance of controversy and.... failed to respond with appropriate diligence and resolve." (Ellas 2003).

Working as an organisational consultant is a very different prospect to working as a salesman. The difference is you are working in the client's best interests in a way in which you too, as a consultant, can work with integrity, authority and meaning. You are working in a way in which ***every step is an intervention.***

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