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Introduction

Six stages of systemic consultation

David Campbell & Clare Huffington

The strength—and the weakness—of the systemic model is that it provides the means for a continual search for meaning. It builds a picture of the ways parts of a whole are connected and speculates about possible meanings attributed to these patterns. Once a meaning is identified, however, a systemic observer must step back to acknowledge that, in identifying that particular meaning, he or she has created a new context and new possible meanings. And where does it all end?

For the purpose of working as a consultant or manager within an organization, a punctuation point has to be reached in order that a decision can be taken, a change made, or a problem resolved. At that point, a particular set of meanings will be used as a basis for action.

The strength of the model lies in its ability to identify many possible meanings from which to construct an understanding of what is going on, and then how best to intervene; its weakness is that it does not encourage people to develop a model of the world from one position. Thus, one could get caught in continually generating new meanings and not taking action when needed. The consultant working within a systemic framework is trying to

help the client reach a position of having the minimum sufficient meanings to be able to move forward in a new way.

The systemic paradigm is based on the idea that, when we observe connectedness, we can see a pattern, and meaning arises from the interpretations we place on the pattern. Pattern leads to meanings. We find that clients in organizations have often got stuck with one particular meaning they are placing on events and that this is not allowing them to develop as individuals, as groups, or as a whole organization. Finding new meanings can loosen connections to a particular set of ideas that are producing the stuckness. It can do the equivalent of throwing open the windows of the sickroom to allow in light and air. Once new ideas and feedback are present, they generate further meanings and creativity is released in the organization, which enables people to solve their own problems.

In this introduction, we present generic ideas that we find essential in carrying out a piece of consultation from start to finish, and we explain the systemic thinking that can be applied at each stage, making reference to our own experiences or to those of the other contributors to this book. We also refer to techniques and ways of working with clients inspired by systemic thinking and used by us or our contributors in this work. We hope that in doing this, readers will be able to find tools and techniques they can use themselves in their own work as consultants or managers.

We asked each contributor to describe the way they use the systemic model in their consultancy practice and to begin their chapter by addressing the question: "What specific interpretation or application of systemic thinking will be underpinning the work in your chapter?" We wanted them to set out the key ideas that they would then illustrate via a case example or examples, where possible including detailed accounts of the exercises and techniques they use inspired by systemic thinking. We also asked them to conclude with an evaluation of the work, pinpointing its strengths and weaknesses and what the contributor learned from it as well as how it might be developed or applied in other situations.

The consultation process can be described in terms of six stages that we have identified as discrete and essential parts of a process

consultation. The description of stages differs from other process consultation approaches (e.g., Shein, 1969; Schön, 1983) in:

- » the emphasis on generating meaning at every stage of the process
- » close collaboration with clients as co-creators of new meanings
- » the relative backgrounding of the consultant and foregrounding of client leadership and action in producing change.

The six stages we are proposing are:

1. developing an understanding of the consultant's relationship to the client;
2. identifying a problem and making a contract for work;
3. designing a consultation;
4. working directly with the participants;
5. using continuous feedback;
6. evaluation.

1. *Developing an understanding of the consultant's relationship to the client*

Consultants are contacted for many reasons. The consultation has to be supported, and paid for, by someone or some group with sufficient authority to sanction the time, effort, and money involved. So the first question the consultant asks is, "What does consultation mean to this person, this group, or this organization?" The sponsor has been engaged in some internal debate among several points of view about how to manage change in the organization, represented by "the staff need some new input to help them through a difficult area", on the one hand, and "we don't want to make things worse by stirring things up with the staff", on the other. It may be that a particular individual sees him/herself as losing out in some way in the situation the organization is in and is seeking to bolster his or her position by securing external help (Selvini Palazzoli, 1986).

This makes us think hard about why the sponsor comes down on the side of bringing you in to consult to the organization. We find it helpful to imagine the discussion that took place in the organization that led to the final decision to contact a consultant. Was there heated debate . . . unanimity . . . agreement with conditions . . . or sulking acceptance, and what kind of reception might the consultant receive when he or she arrives to meet the clients? And why have you, in particular, been invited? Most commonly, the consultant has been chosen by word of mouth, personal recommendation, or some form of tendering process. Sponsors have had time to assess directly or indirectly whether you are both safe and effective for the organization. They will have some sense of whether their organization needs minor tweaking or wholesale change, and you are part of their expectation.

For example, in the chapter contributed by Simon Western, who is based at the Leadership Centre at Lancaster University, he describes how he was initially contacted by his client, the Chief Executive of the Centre for Excellence in Leadership in the Further Education and Learning and Skills Sector in the United Kingdom. She asked him to become her “personal leadership coach” at a time when she was facing a challenge to her leadership style. While successful as a leader of a further education college, her new task was to lead a partnership organization where she felt her existing style would not work. She may have hoped and expected that Western, from a centre of perhaps even greater leadership excellence in the university sector, would be able to help her be a better and different leader in a new context. Western goes on in his chapter to show how his client discovered that her task would not be to be more powerful or dominant but to construe leadership of a partnership of organizations in quite a different way from leadership of a single institution. He illustrates well the way the consultant working with a systemic model can generate new meanings that transform the initial request and expectations into a collaborative search for new meanings.

We have written elsewhere about the differences between the internal and external consultant, and these distinctions are also important at this stage of the process (Campbell, Draper, & Huffington, 1991; Huffington & Brunning, 1994). While the internal

consultant may be seen to be safer, quicker to grasp the issues, and easier to confide in, the risk is that he or she will be seen as having a position and is therefore easier to disqualify—“*She would say that!*” We can see, for example, in the second case presented by Clare Huffington in her chapter, that the Human Resources (HR) Director in the IT company was keen to act on the recommendations from an external consultant that the organization needed to launch a leadership development intervention, especially for the top team and Chief Executive (CEO), both as individuals and as a group. However, the CEO had rejected this external advice as he did not consider it a key priority at the time.

It may have been too far from what was important for him or not linked in his mind with what were his priorities (perhaps a failure on the part of the external consultant to make that link effectively). So he turned to the HR Director—his internal consultant, if you like—for a different way to take forward the need for development. Her approach was more subtle, using coaching from a number of external providers in a stepwise process monitored by her, which the coaches called a “seeping model”. This meant a gradual soaking in of new ideas over time. Although it took about 18 months, it did produce the result that the external consultant had originally advocated. This time, however, the intervention was able to integrate with the key priorities in the organization from the perspective of the CEO and other key stakeholders at all levels of the organization. This is because it became embedded in many layers of meaning.

We would say it is essential that the consultant working within a systemic framework pays attention to the question of ownership of the ideas that get generated. If they are not well rooted in the organization’s experience and fundamentally linked to its key drivers, they will be rejected as too distant, external, or “foreign”. This work is not about the consultant developing clever ideas but helping the clients to find, or re-find, their own meanings, cleverness, and creativity. The challenge for the consultant is to get close enough to really engage with the way the clients think while retaining sufficient distance to be able to comment on these thoughts and the way they are expressed so that the client notices this too.

2. *Identifying a problem and making a contract for work*

We have frequently had experiences in which an organization presents a vague idea that something isn't right and something needs fixing, but they may not have any clearer notion of what needs attention. The clients will, nevertheless, want some clarity about the contract for work they are agreeing to (for a thorough and engaging discussion of the contracting phase, we would refer readers to Peter Block's *Flawless Consulting*, 1981); yet the systemic consultant will want to join the organization in such a way as to be able to observe the organizational process going on around him or her, and to have enough freedom and manoeuvrability to make some formulations about the meaning of the process to the organization. In this second stage, the consultant is trying to strike a balance between agreeing on a focus for the consultation and also leaving the focus broad enough to be able to see the organization in new ways as he or she interacts with it. This "balancing position" can be usefully discussed and negotiated with commissioning clients at the outset of the work.

Philip Boxer and Carole Eigen in their chapter describe how the reflexive consultation process that they designed enabled the CEO of a religious membership organization to take up a position from which he could question the model within which he himself was working as a leader. In the original meeting with the CEO, it had been agreed that an external consultant would certainly not know better than he how to meet the challenge of how to lead the organization in the future. The consultation process would have to be one that enabled the CEO himself to work out how to meet the challenge on behalf of the organization. Therefore Boxer and Eigen formed an internal "shadow consultation group" of four individuals working on contract or within the client system. This group was to work with the CEO and with Boxer as facilitator and Eigen as his shadow consultant. The goal of the facilitation was "to enable the group to notice what was being avoided or was difficult to surface in its own dynamics as it struggled with its task". The consultation process proceeded through monthly face-to-face meetings through three phases, the timing of which were determined by the emergent learning of the CEO and the consultation group; in other words, it was based on the internal

logic of the consultation process and layers of meaning as they were uncovered. The final phase enabled the CEO to challenge a previously unquestioned assumption in the organization that was fundamental to its future and also to his leadership.

This example emphasizes that there are no “off-the-shelf” ways of working within the systemic model. Each consultation is tailored to the needs of the client, and the position the consultant(s) take up in the process must serve these needs effectively. In this case, the autonomy of the client needed to be respected, and the nature of the working group and the stages of the consultation were entirely driven by the development of his thinking about his role. We see consultation as an ongoing process that is triggered by the consultant’s first contact but is continually evolving as the consultant and the organization interact around the consultation project.

3. *Designing a consultation*

A crucial polarity for consultants is between the observing/reflecting position and the need to “put down a marker and act”. This third stage requires the consultant to offer something specific, such as an explanation, a proposal, a policy, or a new structure. The ways this process can develop are varied, and one clear example of work in this stage is provided, in their chapter, by Georgina Noakes and Myrna Gower. Georgina Noakes had a long-standing relationship with the Human Resources department of a large legal firm, through which she frequently met to discuss ways to improve communication within the firm. The firm commissioned her to design and analyse a survey for the staff about communication. This revealed that the legal assistants wanted more feedback about what they were meant to be doing and how their work fitted in to the larger picture. This then prompted the senior partners to approach Noakes to remedy this situation, and she negotiated, with the partners and Gower, to design a structured leadership course for partners as a vehicle for improving the communication between the partners and their assistants.

Keith Kinsella, in his chapter, also provides a good example of the programme he designed to support the improvement of

leadership in a local strategic partnership (LSP), a new type of organization set up by the UK government to re-focus the delivery of services to meet local community needs. The LSP includes police, the local health trust, education, voluntary, business, and other sectors. He had to find ways to support leadership development in a large and diverse group of busy people who wore several hats. His first idea had been to design a free-standing development programme that delegates would attend separately from their ongoing work together. But this proved impossible because of the pressure of time and competing priorities. What evolved instead was a way of working in real time with the LSP in their existing meetings but using what he calls a “close learning ‘development sandwich’” or “layered approach to developing while doing”. This involved simultaneously working at *intention* or purpose (both of learning and doing); at the *context(s)* for the work (many, including each constituent organizational context as well as the shared context); at *process*, so as to look at the emergent ways they were working together and how they could become more creative, and less formal and bureaucratic; and at *content*, the central strategic issues they needed to resolve together.

Thus, what he calls the performing process was shadowed all the way by the development perspective, with one or the other being brought to the foreground where appropriate. This was a powerful and effective process that quickly produced both concrete results and a creative and energized working process for the LSP. Kinsella comments that it was a very intense and demanding way of working for the consultant because of the need to be thinking at all the levels at once and needing to be quick on your feet and good at working in the moment. This is also an important feature of this approach, as we will see in more detail in Stage 5.

4. *Working directly with the participants*

The way systemic consultants work with clients is experienced as quite different from the way other consultants work. Clients will typically say things like, “I never thought about our situation that way before”; “It is such a relief to be able to talk about what is really going on in our team in a safe way”; “I realize I don’t

have to come up with all the answers by myself—I can do what I do with you (consultant) with my colleagues now”. They experience the intensity and depth of the approach in contrast to other approaches. One of the features of the style is of a real focus on meaning but without this being centred on the consultant. What is on the table is a shared exploration of the system from an inside and outside perspective—from the consultant who is outside looking in and the clients who are inside looking out—as well as their perspectives on each other’s views

It can sometimes be difficult for clients to free themselves from the perspectives and meanings they already have. It is a common experience for a consultant working with a group to have members of that group using it as an opportunity to “sound off” their well-honed views without listening to one another at all. The consultant has to be able to develop tools and techniques to:

- » help clients to think more systemically and less individually
- » shift their well-worn patterns of thinking and interacting
- » allow them to play and be creative
- » create a context for them to come up with new ideas and new ways of behaving.

One way that clients begin to think systemically during the consultation is by the consultant asking “systemic questions” that invite the client to explore the way behaviour and ideas influence diverse parts of the organization. For example, rather than asking how someone tried to tackle a particular problem, a systemic question might ask: “When you tried to tackle the problem in that way, what effect did you notice on another department?”, or “What have you observed in other parts of the organization that influenced you to try this approach?” Although the differences between these questions may appear slight, we find that when asked repeatedly over the course of a consultation, they do have the effect of helping people think more systemically about their behaviour.

There are many examples of how our contributors enable participants to generate new ideas in their work—for example, Keith Kinsella and his simple but effective use of Post-it Notes and

working in smaller groups so everyone could have their say; using simple voting processes (“put your 3 red dots on the ideas you want to concentrate on”); and taking regular time-outs to take the group temperature. These techniques had the effect of constraining the usual formal meeting patterns and encouraging risk-taking and informality so that people could share ideas more quickly and easily and tackle some quite complex issues without the anticipated difficulty.

In his chapter, David Campbell takes a different approach in his consultation work by facilitating direct, dialogical communication among participants. In order to do this, he takes the statements people make about their work, identifies them as “position statements”, and then places the position on a polarity line with other position statements. This has the effect of encouraging participants to talk to each other from different positions and thereby get more interested in ideas other than their own. For example, in one consultation a participant said their difficulty was that “there was no compassion from the kids to the carers”; Campbell turned this statement into a position—that clients show compassion for themselves, not others—and then contrasted that with the position at the other end of the polarity—that clients show compassion for others, not themselves. The staff group could then discuss why it may be important for clients to shift their positions in relation to the staff depending on what else was going on in their lives.

5. *Using continuous feedback*

There is sometimes the sense in other descriptions of process consultation that it is enough to carefully diagnose the presenting problem or issue, design a consultation, and then sit back and let it roll! The difference between this approach and the systemic model we are describing here is the intensity of the work done in the moment. There is a need for the consultant to be alert at all times to opportunities to spot emerging patterns and to find ways to make these evident and usable to the client group so that they can become the basis for new meanings to be shared. In this sense it is an emergent, not prescriptive, process. Christine Oliver, in her

chapter, identifies particular pieces of feedback as “moments of significance”, and she describes the way she uses these moments to focus everyone’s attention on a new way of understanding the process the group is going through. For example, she uses a poignant example of someone who, in the midst of the consultation work, sat in a chair, and it collapsed. The next day, the person reported that no one had phoned to see how she was, and she suggested that the group was not caring. Oliver used this event as feedback that touched on another important theme for the group—namely, the ambiguity of accountability in the organization, which meant that colleagues did not know who they could count on. She actively blocked further discussion about whether this was a caring group and led the group into discussion about this theme of accountability.

Another example of using ongoing feedback is represented in the chapter by Marianne Grønbæk. She uses the semantic polarities model with groups experiencing difficulties as a framework for “harvesting” the feedback from one phase of a consultation to lead into the next. Semantic polarities are the range of positions we may take within a particular theme or discourse in order to create meaning in a relationship with other positions. The use of a particular polarity emerges from an initial discussion on a topic with a group. For example, managers in a school staff group identified several themes in the difficulties they were experiencing in their meetings: cultural differences; authority levels; equality issues; responsibility; the need for rules. Grønbæk then describes how she created clarity and focus in the next phase of the discussion by suggesting that there might be a semantic polarity between, on the one hand, “rules and tools will create the best meetings and decisions” and, on the other, “being aware of your own and others’ positions creates the best meetings and decisions”. She then invited everyone to take positions in relation to their agreement with these polarities so as to create a conversation that would allow differences to be expressed in the group. The ensuing differences could then be teased out to allow more discussions based on further emerging polarities so as to finally allow decisions to be made about how future meetings of the staff group would be run. This example elegantly shows how, in stepwise fashion, using

semantic polarities, differences can safely be expressed and used as a basis for expanding meaning in a group rather, than leading to insoluble conflict.

6. *Evaluation*

The consultant working within the systemic model would not usually see evaluation exclusively as a discrete stage in the consultation process but as a mindset throughout the work. The consultant is continually looking for pattern and meaning and trying to create a context for meanings to be examined and evaluated by clients as a basis for new decision-making and action. He or she is aiming to set off a whole series of learning cycles like fireworks all the time if possible (Kolb, 1984). However, the final test of the pudding is in the eating: it is not enough to generate lots of interesting meanings if it does not result in change that is linked to the original reason for calling in a consultant in the first place.

Of course, it is sometimes difficult to measure success against the original goals of the work because the goals can change based on the more developed analysis of the underlying issues that is part of the consultation process. And unexpected and surprising leaps forward can take place! But the consultant needs to be able to track these as time goes on. Nevertheless, there are various ways consultants have tried to pin down and isolate aspects of this organizational process in order to make more evidence-based judgements about what has happened and how the consultant might go forward.

As discussed above, the evaluation that Noakes and Gower describe resulted from a long-standing client interest in communication in the law firm. Interestingly, this evaluation revealed some dissatisfaction that led directly to the longer-term leadership training programme.

David Campbell and Marianne Grønbaek produced a previous volume about their work with positioning and semantic polarities (Campbell & Grønbaek, 2006), and for that publication they commissioned a researcher to interview three directors who had used this model of consultation in their own organizations. This allowed the authors to learn, from a more neutral source, about the

outcome of their work, but also about some specific interventions that the participants found helpful.

Simon Western reports impressive data relating to the success of the partnership working of the Centre for Excellence in Leadership (CEL) following his work with the CEO and constituent organizations. For example, 96% of participants rated CEL programmes as good or very good; CEL worked with 91% of organizations in the further-education sector in the United Kingdom; and within the organization, leadership was distributed and internal communication improved.

Many of the learning points to emerge from Rita Harris's chapter are the result of a training course she established at the Tavistock Clinic. Members of the course, all of whom are managing services, are asked to bring their own work dilemmas to the course seminars, where they are discussed and evaluated by the group consisting of course members. Thus, over time, it becomes clear which interventions are having which impact within their services. This is an excellent method for evaluating ongoing work, but also, by placing the work in a course structure, the students/managers have the opportunity to receive ongoing supervision that allows them to step back and evaluate their own position in the system. Harris used these course discussions to develop her own learning about the impact of the systemic model. For example, she notes that service managers have reported reduced personal anxiety for every small problematic event, and that understanding the interconnectedness of systems has enabled them to make more sense of the emotional environment in their organizations.

Conclusion

In this introduction, we have tried to emphasize that it is important to see systemic consultation as both similar to and different from any other approach to consultation. Consultants from any walk of life would probably agree that these six stages of consultation are fundamental to the work, although they might cast them in different terms. But we have also highlighted some of the specific systemic concepts that make this approach radically different

from many others, such as the careful attention to feedback during the consultation, the emphasis on interaction and dialogue, the appreciation that meaning arises from context, and the consultant seeing him/herself as part of what he or she observes. The chapters that follow go much further in elucidating these concepts and how they are put into the practice of work with organizations.