17 Supervision for organization consultants

Erik de Haan and David Birch

Introduction

Organization Development (OD) consultants are increasingly benefiting from the supervision of their consulting and executive coaching work. Supervision is making an important contribution to the professional development and quality assurance of consultants and is becoming a key differentiator in the marketplace. With the growing professionalism of the OD field, supervision is making an important contribution to many formal qualifications in organization consulting. As more consultants work independently or as ‘sole practitioners’ in many of their assignments, there is a growing need for time and space to reflect in a supervisory relationship. In this chapter we look at the various forms of consulting supervision, and reflect on the pros and cons of different approaches. We end with a few dilemmas that may arise for the OD supervisor. We argue that consulting supervision is a distinctive field in its own right, however, the issues it faces are of relevance to coaching supervisors.

We see organization consulting, or OD consulting, as a broader field than executive coaching or coaching supervision, comprising larger scale organizational interventions such as process consultation, team and organization development, strategic conferences and whole-system methodologies (Checkland 1981; Schein 1987; Weisbord and Janoff 1995). It is precisely the broader reach of these consulting interventions that make consultants work closer with the organization’s agenda and with their clients or ‘client systems’ within the organization. Supervision, although similar to executive coaching mostly organized off-line, nevertheless acquires a broader reach and a deeper view of the organization as a whole. Organization supervision is therefore more complex and multilayered as we will attempt to show in the following examples and models. It is for this reason that organization supervision also branches out into wider areas of the professional’s role, encompassing more frequently (1) the way the consultant or supervisee interacts with other consultants within the context of larger-scale assignments; and (2) the consultant’s or supervisee’s home base or consulting organization, with significant dynamics around the acquisition of assignments or the progression towards more senior roles. In other words, some good OD consulting supervision is
not focused on the supervisee’s client work at all, but rather on the supervisee’s relationships with their direct peers and managers, but always in service of their learning and effectiveness as a consultant.

The varieties of consulting supervision

The organization supervisor and supervisee(s) can decide to work together in three different modalities or contracts:

Individual consulting supervision

This is fully focused on the individual consultant and her practice. The advantage of this approach is that the supervisor is not part of the organizational system and is therefore well placed to attend to the interplay of transference and counter-transference (Searles 1955; Ledford 1985) in the supervisory relationship. Because the supervisor has not had any direct experience of the consulting environment, the supervisor’s impressions are shaped by the way the supervisee is describing their work. By playing back to the supervisee what they are observing in them and how they are feeling, the supervisor is able to help the supervisee to inquire into the assumptions, prejudices and associations that they make with respect to their clients, their consulting practice and themselves.

Case illustration

Roger is a consultant working for a niche consultancy, participating in organization-development assignments and tailored executive education. The firm has five partners (owners) and fifteen senior consultants. Roger is seen as someone who may be able to become a partner over the next five years or so, although this has not been made explicit to him. The firm pays for him to meet with a supervisor (who is a clinical psychologist) at least quarterly, plus an occasional session if he feels he needs one. Although they talk about his client work Roger is preoccupied with the dynamics within the firm, where differences of opinion between the partners are repressed and played out unconsciously by the senior consultants. The partners maintain an impression of always being in agreement. They meet every month and although the whole firm knows when those meetings are, they don’t know much about what is being discussed there. Symbolically, this is represented by the door to the main library, which is normally open, being shut during partner meetings. Roger regularly feels criticized by one of the partners, whereupon another partner stretches out a hand to comfort him. He also feels that he is in competition with one or two of the other senior consultants who are also aspiring to partnership. The work with
clients can be intense, but having to face these put-downs and rivalries in the firm is much harder for Roger. As an outsider to the organization, the supervisor ‘holds up the mirror’ in a way that helps Roger to appreciate his part in the dynamics more clearly. He learns how some of his own reactions are understandable in terms of his own family dynamics, and from the fact that he feels quite exposed and vulnerable in the firm whilst he feels much more impactful and confident when working with his clients. Through his work in supervision, Roger manages to keep a steady course, not to escalate any of the tensions too far, and eventually he is invited to join the partnership. It is not until then that he experiences the more open power struggles among the partners and not surprisingly he finds it useful to continue working with his supervisor at about the same frequency.

Shadow consultancy

This is working as a shadow consultant (Schroder 1974) to one or a group of consultants; in other words supporting a consultancy project in an ‘off-line’ supervisory role. Like individual supervision, the client does not encounter the supervisor, except perhaps as a name on a contract or invoice. The supervisor works away from the glare of the client engagement, ‘in the shadow’ of the consulting team, attending to the resonances within the team as it works on the assignment. This distance from the client system and the presence of inter-consultant dynamics enables the supervisor to pick up still more patterns of transference/counter-transference, or what is often called parallel processes (Searles 1955).

In this way of supervising, the supervisor is usually attached to a team of consultants working on a specific project, but shadow consulting can also take place in mixed groups of consultants or within a consulting portfolio.

Case illustration

A shadow consultant had just started supervising a team of change consultants working at a financial services organization. As the group session progressed, she noticed that whenever the project leader was speaking her mind wandered and even when she forced herself to listen, she was only able to follow what was being said for a few minutes at most. When others in the team spoke, she found it easier to concentrate, but was concerned about the quality of her supervision because she had not fully followed the project leader’s contribution. When the same thing happened during the second session she decided to share her experience with the group in a way that avoided criticizing the project leader. She asked whether others felt the same way and whether this might be a reflection of their work with the organization in some way. To her astonishment several team members admitted that they too
found it hard to follow their project leaders’ thought process. The leader was initially embarrassed, but with the help of the group came to realize that their key client, the CEO, was isolated and remote from their colleagues, who also seemed to only half-understand what they were trying to communicate. The supervisor pointed out that the team’s experience of the project leader was in fact a classic example of a parallel process; in other words a replication of what was happening in the client system.

The supervisor then helped the team think through what the project leader could do differently and how this insight might also be relevant to the CEO. This resulted in a profound shift in the team’s effectiveness, as they learned to share what might be construed as negative feedback in a spirit of mutual inquiry rather than criticism. The CEO was similarly defensive when the project leader shared their observations but was astonished at their accuracy when he sought feedback from his closest colleague. Here again we see how – unlike coaching supervisors – an organization supervisor working purely with the consulting team and their interactions, can have a profound effect on the outcome of consulting interventions in the client organization.

Peer-supervision

This involves working actively as a peer supervisor within a consulting team. Sometimes team members may take it in turns to play the role of supervisor, so that each team member moves back and forth between consulting and supervising roles. The advantage of this approach is that the peer supervisor has their own direct experience of the client organization, which means they can test certain hunches and ground them in the reality of their own experience. This may however compromise their ability to pick up on parallel processes, and in our experience a peer supervisor will need more individual supervision for him or herself to process the conflicts of straddling the boundaries between supervision, consulting and participation in client organizations.

For us the most effective method of peer-supervision involves the peer supervisor remaining somewhat detached from the work of their supervisees, making time and space for the supervision meetings away from the client. Groups of consultants will work best if there is clear contracting between them about the purpose and roles of supervision.

Case illustration

A team of 15 consultants working on a culture change project at a government department were grouped into five peer-supervision groups, or ‘trios’ as they were
referred to. Each trio met for an hour once a fortnight, with colleagues taking it in turns to play the role of the supervisor. In one trio, a colleague was concerned about the management style of one of the senior client staff, which they felt was unnecessarily aggressive and bullying. With the help of their peer supervisor and the third member of the trio, they explored their feelings and reactions, including their unacknowledged prejudice associated with the person’s educational background. This helped them empathize with the individual and re-evaluate their critical stance. Rather than confront the person as they had been intending to, they decided that they would try and build a closer relationship with the person and if necessary influence from a position of support and respect.

What makes working as a consulting supervisor different?

As we have seen in the examples above, the distinguishing characteristic of consulting supervision – as compared to coaching supervision – is that the consultant’s internal relationships with peers and managers become more prominent and provide unique material to help supervisee and supervisor learn about the relationships and dynamics in the client organization(s). The parallel process per se is prominent in all supervision, but this ability to carry the systemic back into the system is distinct and very powerful.

Supervision for organization consultants is an expanding field because of the growing recognition that practitioners need to attend to the dynamics that shape their responses and relational patterns. As argued above, supervisors are in an excellent position to detect, explore and assess organizational dynamics. It is interesting to compare these patterns to Lewin’s well-known ‘force fields’ (Lewin 1951) and to some of the supervision case examples in Hirschhorn (1988).

The degree to which the patterns that the supervisor picks up are amplified or reduced depends on an aspect of the personality of consultants and supervisor called personal ‘valency’ (Bion 1961). A person’s valency for picking up unconscious patterns is strongly related to their personality and personal experiences in life. Patterns we are able to pick up consciously are patterns we are able to experience and observe. Patterns we tend to pick up unconsciously are patterns that somehow ‘stir’ us up, moving us emotionally because they remind us of other earlier patterns that we could not quite (allow ourselves to) experience and which are thus handled less consciously.

In such a way individual supervisors can pick up important determining patterns (blocks to change, opportunities for new change, etc.) that are normally below the level of conscious awareness, but they can only do so within a specific and limited spectrum of valencies. The phenomenon is comparable to the phenomenon of ‘resonance’ in physics, where an object can only pick up and amplify particular frequencies of, for example, sound waves, and not others.
Each of the different modes of consulting supervision offers a unique potential for picking up organizational patterns. The consultants/supervisees act as ‘lenses’ for picking up patterns and issues in the organization(s) and in the process the supervisor also picks up spots or particular issues with the lenses themselves. In the coaching supervision process (see Figure 17.1) the situation is most straightforward, because the supervisor has only one lens and no direct access to the client organization(s) that are being discussed. This offers a clear-cut window onto the coaching relationship and behind that the organizational dynamics. There is relatively little room for amplification or resonance, and the coach’s valency has a modest place in the exploration.

In individual consulting supervision (Figure 17.2) there is more room for picking up patterns, as the consultant has been directly exposed to organizational dynamics between people working for the organization. We can see that the consultant has a broader role in the organization than the coach in Figure 17.1, and will pick up more organization dynamics from direct exposure, and may even become relatively ‘native’ or ‘immersed’ within the organization.

In shadow consulting (Figure 17.3), the supervisor is exposed to a much ‘richer’ dynamic, both a dynamic between consultants and with more ‘antennae’ towards organizational patterns. In our experience dynamics between consultants working in teams may reflect, or mirror, strong and unconscious organizational dynamics as we have seen in some of the examples above and we can also see in Hirschhorn’s example of a deputy director who is under intense pressure and works with a pair of organization consultants who are in turn supervised by the author (Hirschhorn 1988: 40).
Figure 17.2 Schematic depiction of OD supervision for one individual consultant working on a single assignment; the vertical lines represent other client relationships that the consultant and supervisor will have. The horizontal line to the right of the consultant connects to his/her supervisor.

Figure 17.3 Schematic depiction of ‘shadow consultancy’ supervision for a team of OD consultants working on a single assignment; the vertical lines represent other client relationships that the consultant and supervisor will have. The horizontal line to the right of the consultants connects to their supervisor.
Figure 17.4 Schematic depiction of peer-supervision for a team of OD consultants working on a single assignment; the vertical lines represent other client relationships that the consultant and supervisor will have. The horizontal line to the right of the supervisor connects to their supervisor.

Finally, in peer-supervision (Figure 17.4), the supervisor has access to a still wider pattern of dynamics, including their own direct experience. The situation is still richer, but also ‘messier’, as the supervisor will be less clear about what she is picking up is attributable to. The supervision of the peer supervisor is particularly important as a way of grounding certain ideas and observations, and to become aware of patterns that are now no longer accessible. The peer supervisor is picking up patterns that are sometimes four layers deep: organizational patterns which are manifest in patterns of individual client behaviour. This influences the relationship between consultant and client, which is finally experienced in the ‘here and now’ by the peer supervisor. Only then do these patterns become available for conscious processing. It is precisely because of the ‘free response’ enabled by the supervisor’s valency, that these patterns can be picked up in the first place. Valuable as they are, they will be biased or coloured by the personal experiences they went through before being consciously detected.

A case illustration

Having looked at the modes of consulting supervision and the types of contracts that we have ourselves engaged in both as clients and as supervisors, we shall
now review a recent case example, anonymized for publication. This was a one-off shadow consulting engagement which illustrates some of the complexities involved in consulting supervision, including how the consulting ‘system’ and the client ‘system’ can influence each other in unexpected ways.

**Shadow consulting**

Graham was part of a consulting team engaged by a prestigious university to help revitalize and engage the professoriate in its research strategy. As the assignment progressed he became aware that he was avoiding contact with another consultant called Helen, which troubled him as they usually worked extremely well together. He felt that Helen was disinterested in him and his ideas and seemed intent on pursuing her own agenda with the client. This was exacerbated by the close relationship that Helen had established with a senior professor at the university who had an outstanding international track record as a research leader.

Graham knew that he ought to raise his concerns with Helen but felt strangely anxious at the prospect of doing so. He was convinced that Helen would ridicule or humiliate him if he brought the subject up, so he played safe and chose not to share his growing feelings of resentment with his colleague. Not only was he feeling shut out, he was also aware of a growing anxiety that he was somehow failing in Helen’s eyes, and that she was privy to some critical feedback from the client about his contribution to the project.

Eventually it was Helen who brought the topic up with Graham, concerned that her colleague had grown so distant over recent weeks. Graham remained reluctant to engage with her but agreed that it would be a useful topic to take to the next meeting with the team’s shadow consultant.

The shadow consultant supervisor helped Graham and Helen discover how they had come to identify with their respective client contacts in the institution. Helen had a rapport with the senior professor, who was highly influential in shaping the university’s research agenda. Graham meanwhile had established a bond with a less prominent academic, who the professor often expected to take on the less interesting administrative tasks. Graham had grown accustomed to hearing their complaints about how the professor showed little interest in their ideas and contributions and felt generally used and abused by them. The supervisor suggested that they might be participating in a ‘parallel process’, where the dynamics present in the relationship between the two clients was being recreated between Helen and Graham.

The supervisor suggested that an exploration of the parallel process might yield some useful clues about how Helen and Graham might work more effectively together and within the client system. With the shadow consultant’s help, they each role-played the client who they felt closest to, using their experience and intuition to explore how their clients were feeling about one another and the strategizing process. To Graham’s surprise, Helen was adamant that ‘her’ professor would have been
horrified to know that his colleague was so angry with him, which opened up a discussion about how they could help the two professors become more aware of their unconscious patterns of behaviour. They decided to work with this theme soon afterwards in a facilitated workshop where the clients were encouraged to actively listen and inquire into one another’s thinking. Following a process review, the professors agreed that this more searching and robust conversational process should become a regular feature of their strategic process.

Graham meanwhile felt relieved that his strong relationship with Helen had been restored and acutely aware of how an exploration of his supposedly personal feelings in supervision had unexpectedly provided such a powerful insight into how he might best serve his clients in the future.

This case study illustrates how a shadow consulting supervisor can play an important role in helping consultants ‘step back’ from the drama of the assignment and inquire into the assumptions, prejudices and unconscious processes that can interfere with their ability to think clearly about their clients or their own teamwork. The shadow consulting supervisor needs to listen carefully to their clients’ narratives, without actually believing them to be the ‘whole truth’. As they listen, the supervisor reflects on the potential relationship between the consultants’ narratives and the organizational process that they are immersed in with their clients. The supervisor’s role is to help the consultants reframe these narratives; they are able to do this only when they understand how their participation in the client system has distorted their capacity to think and respond clearly and appropriately.

Dilemmas for OD consulting supervisors

Although the different modes of supervision are quite distinct from one another, the potential approaches open to the supervisor are broadly similar, whatever the mode or the client context. In particular, supervisors tend to experience a number of dilemmas, which crop up again and again when working with clients. In the following paragraphs we hope to capture some of those, and to convey something of how it feels to work as an OD consulting supervisor.

In the first place as human beings and as supervisors we feel the limits – and hidden promises – of our valencies quite acutely. We become aware of our own counter-transference (Ledford 1985) without necessarily knowing what it is about: we feel unease, discomfort, distraction, displaced anger, boredom, or other feelings that feel real but may be a manifestation of the client/consultant dynamics that are experienced by the consultants being supervised. In other words we feel the sensation in our ‘antennas’ before we can even begin to make sense of the signal. And if we attend to the sensation we become aware of the inadequacy of our measuring equipment in this area, which is so strongly entwined with our own unresolved issues and transferential patterns. This dilemma begins as discomfort,
then emerges as a choice whether to attend or not, and may become a huge doubt about whether what we feel is of any use to our supervisees.

Second, if we then move closer to reflecting back and communicating some of our observations, we can feel dilemmas about how impactful we should be, or how tentative. Of most benefit to the supervisee is usually to be both a. impactful: concise, sharp, challenging, new, original, focused; and b. tentative: as an invitation to further reflections rather than as the final word on any matter the consultant(s) is bringing.

Furthermore, when addressing or opening up new client material we will experience dilemmas as to how much to set the tone. Is it more useful to our clients and ultimately to the organization to work in an emergent way, i.e., similar to how an executive coach or OD consultant might work? Or is it important to be directive and map all aspects of the ‘case’ more actively, working more like an expert consultant?

Similarly we may have dilemmas around when to work in conversation, i.e., reflectively, and when to work more in a ‘playful’ way, for example by recreating the organization’s dynamics in role play, ‘two chair’ work, psychodrama and organization constellations. Emergent, playful ways of working may provide a stronger lens into unconscious dilemmas within the client organization, because in these interventions the supervisees will be less able to censor their material.

Next, we have experienced dilemmas and concerns in terms of the role we play for the client organizations. Ultimately, the client organization should be the main benefactor and the ultimate client of our work, but they are – usually – one step removed from the supervisory relationship. We have noticed that we struggled at times to be aware of our own engagement with the organization. On the one hand we know we need a certain level of detachment to begin picking up organizational patterns that were not noticed by the consultant. On the other hand, we aim to be impactful in the consultants’ client organization. As an organization supervisor one finds oneself in a similar predicament to that of a wildlife documentary filmmaker, where one’s observing presence will at some stage, unknown to them, begin to have an impact on the ecosystem observed. The scrutinizing lenses of consultants and supervisors are not just passively observing, they are also present objects in the field of view of the organization’s employees, and so they may become a yardstick for them measuring progress in the organizational domain. The presence of a coach supervisor is usually much more at a distance to their supervisees’ client organizations, such that this dilemma does not occur.

Finally, we have experienced dilemmas about the normative aspect of supervision as well. If a consultant’s manager is only interested in revenue or billable days as a ‘measure of success’, their supervisor is in a much better place to hold meaningful performance conversations with consultants. However such conversations hold an intrinsic risk of the supervisor becoming a surrogate ‘performance manager’ the consultant.
Some consultancy firms have internal ‘mentors’ working alongside external supervisors, whose task it is to hold those performance conversations that go beyond billable days and who report directly to the consultants’ line manager.

**Evaluation of this mode of supervision**

On the whole, OD consultants have to work within an organization whilst holding on to their outsider’s perspective. They have to apply their knowledge, experience and intuition as they engage with the organization, acquiring, as they do so, an insider’s perspective on the organization’s issues. Such a stance of being an ‘outsider within’ is not straightforward at all, and carries with it all sorts of temptations, risks and limitations (De Haan 2006). On the one hand there is a risk in staying overly analytical and detached, which often results in observations, ideas and solutions that are more relevant for the consultant – or for their previous clients – than for the case in point. On the other hand, consultants risk becoming over involved if they identify too strongly with the organization’s agenda and issues. One could call this the dilemma of ‘aloofness versus collusion’.

However supervision can be of great benefit to organization consultants as it can help to maintain a balance between these opposing risks and temptations. A supervisor stays – as much as possible – outside of the client engagement, and is much freer to comment on what might be going on for the client and within this client-consultant relationship. Supervision can have an immense formative effect on consultants, not to mention the value it has in a normative and restorative sense (Proctor 2008). Organization consultants often experience anxiety and stress as they try to balance a very diverse portfolio with competing obligations to clients and colleagues. Supervision can help to reduce the stress by helping the consultant to reflect on and understand their own reactions and responses. The supervisor is in an ideal position to provide some ‘normative’ feedback on a consultant’s practice, based on a respectful appreciation of the complexities and challenges that they face. The supervisor’s understanding is often better than that of the consultants’ line manager or even the consultant herself. We are excited by the prospect of further development and professionalism of consulting supervision so that it can take up its rightful place in the support and quality assurance of organization consultants and expert consultants alike.

**Learning more**

The following activities are to enable further reflection about the rich profession of consulting supervision:

1. Ask two clients or friends who work for the same organization to engage in a short conversation about the challenges that they face over the next couple of weeks. Notice not only which challenges they choose to address
but also notice how they speak about these challenges. Very often the way in which they conduct their conversation will tell you something about the challenges themselves. After the short conversation you may ask them how their responses were ‘typical’ for their organization’s culture. Then you can share your own observations about how they spoke with each other and how these apparent dynamics between them may relate to the issues that they discussed.

2 Make a timeline of all the employers that you have worked for, including yourself if you have been self-employed. Try to find at least one aspect that all these organizations have in common. Then ask yourself what your choice of employers may tell us about you. What are themes or patterns that you are likely to pick up quite quickly with clients because of your previous organizational experience?

3 Take some time after your next supervision session to map out the dynamics at play. Describe the interaction at that supervision session on four different levels: within the client organization, between the supervisee(s) and clients in that organization, between the supervisee(s) and you, and between you and you (i.e. in your own mind) when you come out of the session. See if you can find any overlap between these patterns of interaction, and try to understand which of the four levels this key pattern comes from, i.e. where are its origins?

The following three texts are useful further reading:

Larry Hirschhorn (1988) *The Workplace Within: Psychodynamics of Organizational Life*. From an anonymous Amazon book review that we concur with: ‘Don’t let the title of this fine book scare you off. Hirschhorn’s *The Workplace Within* is one of the finest tools available for the executive who wishes to deepen his or her understanding of what goes on in organizations today. When read carefully, thoroughly and critically, this book can be a wonderful tool for extending one’s social sensitivity in the workplace.’

Marjan Schroder (1974) *The Shadow Consultant*. Schroder’s short article is one of the earliest recognitions of some of the specifics of the task of the (internal) organization supervisor. With great sensitivity and powerful examples Schroder demonstrates how even a peer OD consultant can do a good job supervising their consulting colleagues.

Peter Hawkins and Nick Smith (2006) *Coaching, Mentoring and Organizational Consultancy – Supervision and Development*. This is a practical resource book that examines the values and assumptions that underpin organizational consultancy and explores the vital importance of supervision to maintaining an ethically sound practice.
Note

1. It is worth reminding ourselves here that an executive coach can also be seen as a ‘supervisor’: as the supervisor of the team that her client leads.

References