23 Supervising organization consultants

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Introduction

If supervision is now regarded as a foundation for sound professional practice among coaches, growing numbers of organization development (OD) consultants are also benefiting from the supervision of their organization consulting and design work. This applies both to those working as internal practitioners within large organizations and to those working independently or as part of a consultancy. In this chapter we look at the various forms of consulting supervision, and reflect on their pros and cons. We argue that OD supervision is a distinctive field in its own right; however, the issues it faces are also of relevance to coaching supervisors. We end with a few dilemmas that may arise for the OD supervisor.

OD consulting is a broader field than individual coaching, comprising organizational interventions such as process consultation, team and organization development, organization design, strategic conferences and whole-system methodologies (Checkland 1981; Schein 1987; Weisbord and Janoff 1995). The broad reach of these interventions means that consultants are working closely with the organization's strategic agenda and the interplay of fast-moving social and political dynamics. Compared to coaching supervision, which tends to focus on the practice of team or individual coaching, OD supervision deals with the practitioner's active participation in the messiness of complex and multi-layered organizational systems. OD supervision also encompasses wider aspects of the professional's role, such as (1) the way the consultant interacts with other consultants within the context of larger-scale assignments; (2) the dynamics of the consultant's home base or consulting organization, for example around the allocation of assignments; and (3) the potential for the supervisor to hold their supervisees to account, confront unethical behaviour or safely feedback themes from supervision to the organization. In other words, good OD supervision may not necessarily be focused on the content of the supervisee's client work at all but rather on the supervisee's relationships with their colleagues and clients, in service of their learning and effectiveness as a practitioner (De Haan and Regouin 2016).

OD consulting supervisors and supervisees can decide to work together in three different modalities: individual supervision, shadow consultancy or peer supervision. We discuss the merits and limitations of these approaches below.

Supervising the individual consultant

This is supervision that is fully focused on the individual consultant and her practice. Individual consulting supervision works best when the supervisor is external

to the organization allowing them to attend to the interplay of transference and countertransference (Searles 1955; Ledford 1985) in the supervisory relationship. Because the supervisor has not had any direct experience of the consulting environment, their impressions are shaped by the way the supervisee is remembering or 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 inquire into the assumptions, prejudices and associations that they make with respect to their clients, their consulting practice and themselves.

Box 23.1 Individual consulting supervision case 1

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 15 senior consultants. Roger is seen as someone who may be able to become a partner over the next five years or so. The firm pays for him to meet with a supervisor at least quarterly. 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 agreeing, but others in the firm do notice that they rigorously meet behind closed doors while for other meetings the door is always open. Roger regularly feels criticized by one of the partners and feels that he is in competition with another senior consultant also aspiring to partnership.

As an outsider to the organization, the supervisor 'holds up the mirror' in a way that helps Roger appreciate his contribution more clearly. He learns how some of his own reactions are understandable in terms of his own family history, and from the fact that he feels quite exposed and vulnerable in the firm while he feels much more impactful and confident when working with his clients. Through his work in supervision, Roger manages not to escalate any of the tensions, and eventually he is invited into the partnership. Only then does he experience the raging power struggles in the partnership and finds it useful to continue working with his supervisor.

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1. Shadow consultancy

This is where the supervisor is working as a 'shadow consultant' (Schroder 1974) to a pair or team of consultants; in other words, supporting a consultancy team in an 'off-line' supervisory role. Like individual supervision, the supervisees' clients do 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/countertransference, or what is often called parallel processes (Searles 1955).

In this arrangement, the supervisor contracts to work with the consultants working on a specific project, but shadow consulting can also take place in mixed groups of consultants working across a number of different projects.

Box 23.2 Shadow consulting case 1

A shadow consultant 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. Even forcing herself to listen did not help. When others spoke, she found it easier to concentrate. 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. To her astonishment, several team members admitted that they too found it hard to follow their project leader's 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 his colleagues, who also seemed to only half-understand what he was 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 reflect on how this insight might also be relevant to the CEO, who was similarly defensive when the project leader shared their observations but astonished at their accuracy when he sought feedback from his closest colleague.

This case study illustrates how a shadow consultant can play an important role in helping consultants 'step back' from the immediate drama or conflict 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 she listens, the supervisor senses the potential relationship between the consultants' narratives and the organizational process that they are immersed in with their clients. Working in the 'rumblings of the collective shadows' (Shohet and Shohet 2020), she hesitates to raise her own felt sense, not entirely sure if this is her own professional 'lapse' or has relevance for her supervisees. Her role is to reflect on herself, use courage to share her difficulties, and invite her supervisees to come alongside her reflections. As they do so, they understand how their participation in the client system has distorted their own capacity to think and respond clearly and appropriately.

2. Peer supervision

This involves peer-to-peer working among a group of colleagues from a consulting team or organization, with supervisees moving 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 team or 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, or the inevitable tensions between supervision, consultancy and participation in the organization. For these reasons, peer supervision can benefit from the input of an external supervisor to facilitate the process and support peer-to-peer working. An external supervisor can help the peer supervisor to stay sufficiently detached from the content of their colleague's work in order to notice and inquire into their transference and parallel process. Whether or not an external supervisor is used, peer supervision groups work best when they have contracted on the timing, purpose and roles of supervision.

Box 23.3 Peer supervision case 1

A team of 15 consultants working on a culture change project were grouped into five peer-supervision groups, or 'trios'. 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 aggressive and bullying. With the help of their 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, they decided that they would build a closer relationship with the person and influence from a position of support and respect.

Attending to relational and organizational dynamics in OD supervision

As we have seen in the examples above, the distinguishing characteristic of consulting 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 relational patterns and dynamics in the OD work. The parallel process is prominent in all supervision, but this ability to carry the *systemic* back into the *system* is distinct and powerful.

The degree to which the patterns are amplified or reduced depends on an aspect of the personality of supervisees 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 sway us like other earlier patterns that we could not quite (allow ourselves to) experience and which are thus handled less consciously.

In this 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. Each supervisee acts as 'lens' for picking up patterns and issues in the organization(s) with the supervisor also spotting issues with the 'lenses' themselves. In the *coaching supervision* process (see Fig. 23.1 below) the situation is most straightforward, because the supervisor has only one lens and no direct access to the supervisee's client organization. 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.

Note: 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.

In *individual consulting supervision* (Figure 23.2 below) 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 23.1, and will pick up more organization dynamics from direct exposure, and may even become relatively 'native' or 'immersed' within the organization.
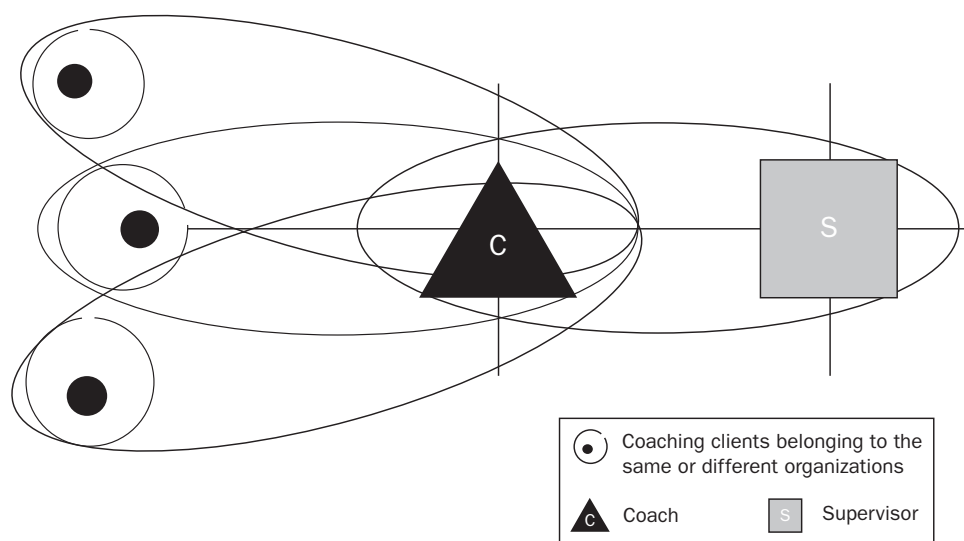
Figure 23.1 Schematic depiction of executive coaching supervision for one individual coach
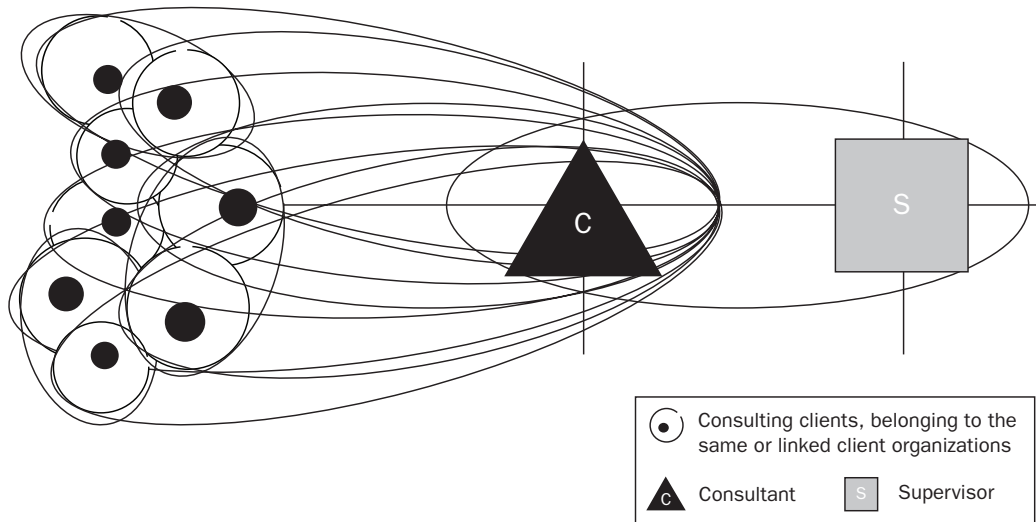
Figure 23.2 Schematic depiction of individual supervision for a consultant working on a single assignment

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Box 23.4 Individual consulting supervision case 2

Naomi is an internal consultant working on a complex restructuring project. She works part-time and reports to the HR director. Mid-way through the project, the HR director resigns and is replaced by someone new to the organization. Naomi is taken aback to find that her new boss wants her to refocus her efforts on a different project. Naomi appreciates the importance of this work but feels aggrieved that she has not been consulted over the change and her restructuring project is being overlooked. In her individual supervision, her supervisor suggests using a table-top constellation to explore the political dynamics of her situation. Using the supervisor's collection of buttons, Naomi maps her position in the system. She places her own button far from the new HR director but close to the buttons representing the CEO and Strategy Director. Her supervisor encourages her to speak from each of the positions represented. This helps Naomi express her frustration with her new boss and loyalty to the CEO and Strategy Director. She comes to appreciate the isolation of the HR director and lack of knowledge about her. She also speculates that he may feel threatened by her proximity to the CEO. Naomi leaves the session with some insights and ideas how to build a more constructive relationship with her new boss.

In *shadow consulting* (Figure 23.3 below), the supervisor is exposed to a much 'richer' dynamic between consultants, with more 'antennae' towards organizational patterns. In our experience dynamics between consultants working in teams may reflect, or mirror, strong and unconscious organizational dynamics.
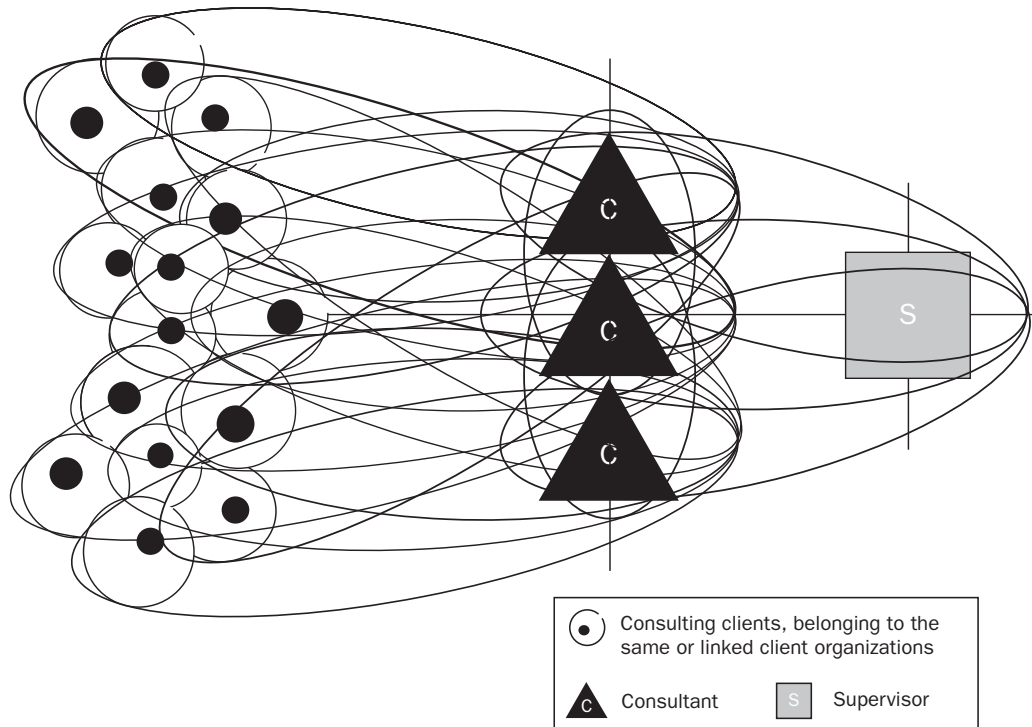
Figure 23.3 Schematic depiction of 'shadow consulting' supervision for a team of OD consultants working on a single assignment

This is shown in some of the examples above and 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).

Box 23.5 Shadow consulting case 2

Graham was part of a consulting team engaged by a prestigious university to help engage the professoriate in its research strategy. He became aware that he was avoiding another consultant, Helen, which troubled him as they usually worked well together. He felt that Helen was disinterested in 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 successful senior professor.

Graham knew that he ought to raise his concerns with Helen but felt 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 chose not to share his resentment with his colleague. He was also aware of a growing anxiety that he was failing in Helen's

eyes, and that she was privy to 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 recently. Graham 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 highly influential senior professor. 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 became 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.
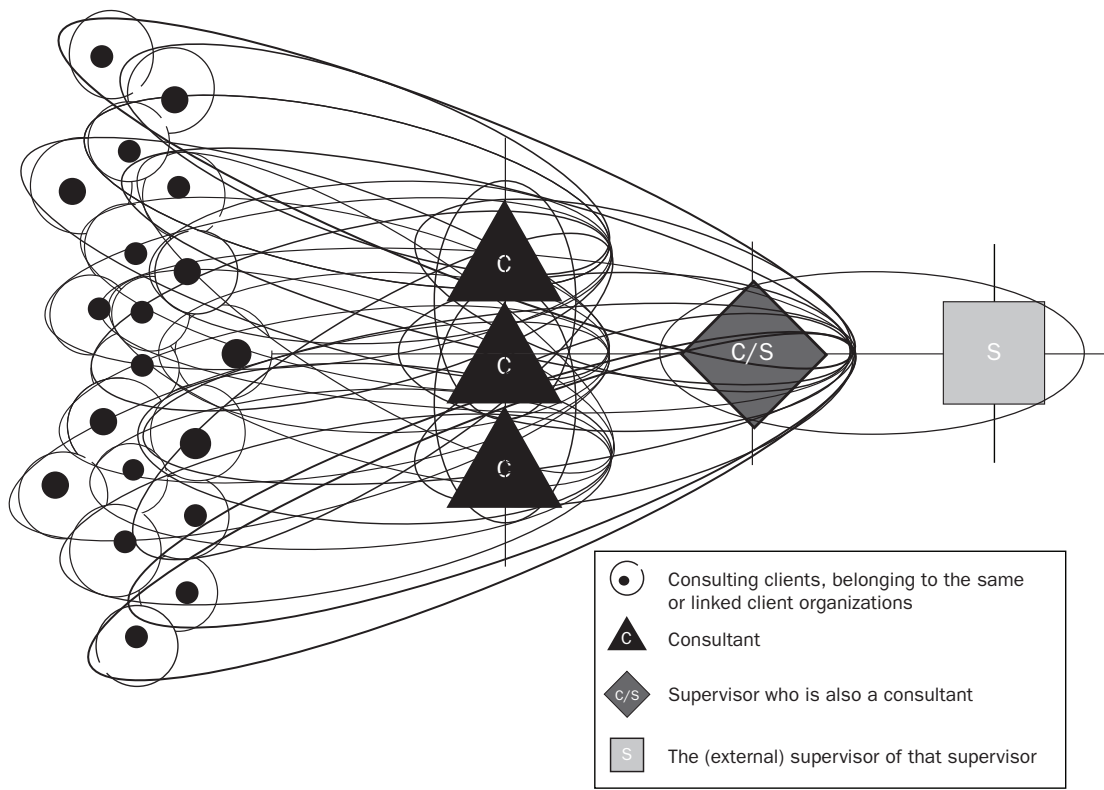
With the shadow consultant's help, Helen and Graham each role-played the client who they felt closest to, using their intuition to explore their clients' feeling about one another and the strategizing process. To Graham's surprise, Helen was adamant that 'her' professor would have been horrified to know 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. In a facilitated workshop their clients were encouraged to actively listen and inquire into one another's thinking. Following a process review, the professors agreed that this conversational process should become a regular feature of their strategic process.

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

In this case the consulting supervisor is picking up patterns that are three layers deep. First, organizational patterns are manifest in patterns of individual sponsor behaviour, in this case professional rivalry and failed negotiations on leadership. These then influence the relationship between consultant and sponsors, which is finally experienced in the 'here and now' by the shadow consultant.

Finally, in *peer supervision* (Figure 23.4 below), 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 legend reads:

- ⊙ Consulting clients, belonging to the same or linked client organizations
- ▲ (C) Consultant
- ◆ (c/s) Supervisor who is also a consultant
- ▢ (S) The (external) supervisor of that supervisor

Figure 23.4 Schematic depiction of peer supervision for a team of OD consultants working on a single assignment

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Box 23.6 Peer supervision case 2

An internal supervisor was working in a global corporation and had been asked to supervise a pair of OD consultants, who had been tasked with a sensitive internal improvement project. The two consultants had happily worked together before, but their relationship had become strained as this assignment pulled them in different directions. Also, in another piece of work an external client had split up the pair, making one of them respond favourably to 'outrageous' requests and the other becoming increasingly resentful of that. They both felt bruised and aggrieved afterwards, on the brink of a complete breakdown of relationship.

The request for 15 hours of 'supervision' felt like a piece of mediation between the two. They both kept emphasizing how different they were, referring to a personality instrument that they used in the company. The supervisor got somewhat distracted as she had strong feelings about that tool and how literally it was being used in the company. Only gradually could she explore other, more hidden, areas of the consultants' personalities and raise the boundary issue of taking the

psychometric data concretely and explanatory for the personalities of the individuals (Metselaar and De Haan 2015).

At one point the supervisor asked for a metaphor as to how they were experiencing themselves in the small team. After some reflection, one of the consultants said, 'I see myself as a hedgehog or porcupine in this relationship, where I often curl up in defence and withdraw within myself if I am feeling attacked. I think porcupines have both spines and quills. I can raise my spikes, I can even shoot my quills, and I probably do both at times.' The other consultant contributed a different image: 'It is as if I am walking in the forest near my house, and then suddenly an alien is dropped in front of me, and I no longer feel safe. Or sometimes it is as if I am on a fast ride in a fairground horror house, where at every corner some object or ghost is hurled at me and I fear for my life.' It was a tremendous breakthrough when they all realized that the two scary metaphors were in fact. . . complementary.

Later in supervision they deepened their realization that not only did they complement each other very well, but they also spanned virtually all the conflicts within the company. They could now translate what they saw as their personality differences into the awareness of different styles and allegiances within the system in which they operated. From this insight onwards, their internal consultancy offer went from strength to strength as they built a 'band of sisters and brothers' and fearlessly confronted fears and splits within the organization. Later still, they rediscovered their early, friendly collegiate relationships, which they deepened, with more spontaneity and with the ability to stand up and openly disagree if necessary.

The peer supervisor is picking up patterns that are sometimes four layers deep as in this case. First, organizational patterns that have stirred her up in the past. Then organizational challenges as experienced by the consultants, apparent in patterns of individual client behaviour. These then become topics for consultation and also apparent in the relationship between consultant and client, some of which is also 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 inhibitions and emotions 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 in the same organization, before becoming conscious and available to work with.

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 countertransference (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*

1. Impactful: concise, sharp, challenging, new, original, focused; and
2. 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 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' for 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 consultant's line manager.

Summary and research potential of OD supervision

On the whole, OD consultants have to work within an organization while 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 consultant's 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.

Supervision can also be a highly appropriate space to research consulting interventions. This is already happening in the form of qualitative 'Action Research', where themes are identified and fed back anonymously to the client organization (see, for example, De Haan 2012: 119). We see a lot of potential for more quantitative process research as well, because of the demarcated, measurable space and time for supervision as a 'laboratory' for researchers that can capture some of the changes brought about by the more diluted, fuzzy and unbounded consulting

interventions. For example, coaches' and consultants' experience of 'safety' and 'trust' in supervision has been quantitatively studied (De Haan 2017). Also, it should be possible to organize a randomized controlled experiment comparing consultants with and without supervision, or consultants with and without coaching assignments as part of their interventions.

Guidance for further learning

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 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 the 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 these four levels most ignites this key pattern (i.e. where are its origins?).

The following three texts are useful further reading:

Larry Hirschhorn (1988) *The Workplace Within: Psychodynamics of Organizational Life*. Cambridge, MA: MIT Press. This is one of the finest tools available for those wishing to deepen their understanding of what goes on in organizations today and extending their social sensitivity in the workplace.

Marjan Schroder (1974) The shadow consultant, *The Journal of Applied Behavioral Science*, 10(4): 579–594. 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*. Maidenhead: Open University Press. 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.

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