A Manifesto for an Open-Ended Consulting Practice

A little while ago my colleague Dr Garth Britton and I began thinking about the ways in which our work as consultants and coaches had changed over the past five years. At the time we developed a very rough description of an approach we called *Open-Ended Consulting* based on some broad patterns we had detected in our practices. Then we got busy with work and life and didn't progress this any further.

I've been thinking recently that much that I have learned as a consultant, facilitator and Executive Coach I wish I have known when I was a senior executive. With that in mind I returned to this work, thought about it a bit further and began to flesh it out.

The principles we developed are:

- **Begin in the middle** – observe people and their work in context and develop rich description(s) of the situation and its antecedents.

- **Engage deeply and often** – talk frequently to test insights and understandings and agree what is intended and what needs to be done.

- **Notice** "rich points" and "striking moments" and explore similarities and differences

- **Work together to co-design** and articulate new ways forward (next steps), alternate understandings and potential new practices (disciplines).

- **Initiate short, sharp activities** to test ideas, strategies and implementation approaches

- **Continuously gather data to inform and test** the ongoing usefulness of new frames and formatively evaluate the impact and effectiveness of emerging practices and tentative action.

Our thinking, as we identified these practices, has been heavily influenced by an alternative tradition of thought about how we, as humans, engage with the world and each other. This tradition is strongly social in its underpinnings, recognising that from our birth, if not before, we engage with the world around us, including other people, both bodily and discursively. It is therefore a powerful alternative to strongly individualist ideas and helps to counteract the prevailing tendency to see the mind as separate and superior to the body, including particularly emotions and intuition. In our view this tendency often leads us to seek objectivity in situations where it is simply not possible, at least not in the time available to make a decision about what to do next. It also means we often under-value the other ways of knowing we have available to us.

Exploring and experimenting with these practices has helped me be more confident in starting our work in complex and ambiguous circumstances by simply talking to people about how they are experiencing the situation and how they understand it. It has also reinforced for us the value of local, contextualised understandings and locally developed experiments, prototypes and actions as the basis of learning the way forward, one step at a time.

Working with these principles in mind has been particularly fruitful when engaging with organisations and organisational leaders in circumstances where they know, or perhaps simply have an uneasy feeling, that things aren't going the way they planned or that, to a greater or lesser degree, the wheels are falling off.

Mostly when this happens people go looking for a pre-existing solution, which of course assumes that you know reasonably precisely what the problem is. Inevitably there is a range of pre-packaged solutions available. Inevitably, too, they often turn out to not be a particularly good fit to the situation or, even worse, the solution to a problem that isn't exactly the one you are experiencing.

All of this pre-supposes two things: firstly that what is being seen or sensed is the problem, and secondly, that thinking about organisational dilemmas as problems that require solutions is the most useful thing to do. Our experience suggests that this may not always be the case.

So here I have tried to describe some of the things we have learned and the way these translate into practices and approaches.

Generally we begin in a situation with a client by acknowledging that neither we nor they fully understand what is going on. At the same time we also recognise that collectively within the organisation, or across the the organisations involved in the situation, people do know a great deal more than they have been able to say so far. So our first step is to wade in and start "in the middle" to engage deeply with the people who are in the situation, devising ways to tap into their knowledge, perhaps enabling unheard voices and perspectives to be heard, in order to bring the situation to life. In doing this we seek as well to "go upstream", back into the history of the situation and people's involvement in it. We do this so that a sense of how things came to be the way they are can emerge along with a sense of the various trajectories embedded in current activities. We generally do this before turning attention to where to go and what to do next.

Sometimes collecting this data involves very loosely structured interviews/discussions, sometimes meeting with people in groups and sometimes the use of a more formal software-based qualitative data collection method. However we gather this data we focus on asking people to be descriptive, that is to tell us stories about their experience of the issue or situation. This is part of a process of seeking to understand and make sense of the situation "from within" rather than assessing it judgmentally from outside.

This generally leads us to do this work iteratively, first getting the people to describe their experiences and then asking them to tell us what their stories/experiences mean in the context of the issue or situation being explored. Once again we seek creative ways to do this that work in the context. One way that has worked particularly well has been to set up a space with the organisation where the data is displayed in some way as it is collected and analysis begins so that interested people can drop in and perhaps lend a hand or make an observation. This always leads to interesting conversations and insights and perspectives that might not have emerged in more formal settings. At other times we will have recorded some of our interviews and discussions and are able to extract particularly interesting excerpts from them which can then provide the stimulus for discussions in small groups.

Somewhere along the track we begin to develop a sense of what is important to the people and the organisation, where people are uncomfortable or stuck, what would make sense to try in order to change the situation. To "nudge" it more in the direction people want and need.

As we do we look to find ways to mirror back to people in the organisation, especially those who have the authority to initiate activities and expend or re-direct resources, what we have

been seeing and hearing and our sense of where the starting points for doing something different might be. Generally this means that while we might write a report it won't be a typical consultant's report. Equally we might, if the circumstances are right, use more visual and descriptive forms of communication. Whatever we do we bear in mind that the end-product deserves to have a a "social life" and be a resource around which people in the organisation can gather to explore possibilities and potential ways forward. Whatever the form of presentation we are much more likely to propose some short-term safe-to-fail experimentation and ongoing action-based inquiry than we are to present a fully worked out plan of action.

We think about the kind of work described here as taking place in the "space between". That is, the space between knowing and not-knowing, between those who are truly within the situation and ourselves who have become part of it temporarily and between and among the different perspectives that inevitably go to make up an organisation on its way to somewhere else. We do this to remind ourselves that we are entering territory in which no-one is the expert and in which there is much that we either do not know or cannot yet articulate. It also is a reminder that we may be working in a situation in which the conventional notion of a definable problem and a solution that follows logically might not apply.

In setting this out we feel the need to stress that it isn't a recipe that can be followed precisely and repeated precisely the same way to get the same result in different context. We see it more as an emerging collection of descriptive concepts that help us to prepare to engage with our clients and, in that engagement, to jointly find ways to occasion both insight and meaningful activity in directions that matter.

These principles have also grown out of and in turn influenced our practice as coaches and facilitators. Over the past ten years or so be began to recognise that learning, development and growth come in many forms. I am reminded of the distinction, made originally by Chris Argyris, between single-loop and double-loop learning. There also seems to me to be a useful distinction to make between learning and development that, in effect, adds more skills and capabilities within a particular orientation, and learning and development that leads to a fundamental shift in orientation.

When I began in 2000, coaching was arguably just entering its second generation and moving from a focus on what might be called skills coaching, which grew out of sports coaching, into goal focused coaching. The kind of coaching that is exemplified by the GROW model. That is, helping people achieve what they needed to achieve in the context of their role within an organisation and/or their aspirations in life. The focus was and remains on performance in relation to specific goals or ends.

Early on I was lucky enough to encounter a number of people who certainly didn't need skills coaching and were very adept at achieving goals and making things happen. They did, however, sometimes find themselves in situations that were hard to figure out and in which conventional approaches to leading, managing and organising didn't always seem to work. With these people I quickly became a partner in conversations that were much more focused on sense-making to some degree but often just on finding a way to "go on". That is to work out what would make sense for them to do in this situation at this time, given what they currently knew.

Two things in particular grew out of this experience for me. Firstly the recognition that in

many instances working out how to "go on" or perhaps "make progress" was a great outcome, because in many of these circumstances it was actually impossible to frame the issue as a problem, at least in the conventional way. Often it was nothing more than a sense of unease or disquiet. Sometimes it was something so complex that establishing even a cursory sense of the factors that were at work was too difficult. So people had got used to feeling their way forward but appreciated the time and space to talk it through a bit.

Secondly I developed a heightened appreciation of the power of what one writer calls "relational-responsive" talk. What I mean by that is that it was OK to be involved in a conversation that went all over the place, that wasn't structured and which I contributed observations and opinions to (conventionally coaches didn't offer advice). These were conversations which required significant attention and I found myself somehow knowing what to say without having consciously thought about it. I also learned, through practice, that it helps to make any "background thinking" explicit, rather than keeping it hidden.

I began to understand more fully that who we are and how we "show up" in a conversation is an incredibly important part of what sets really good leaders apart. I also began to understand more fully how much the conventional thinking about leadership actually constrains how many people in leadership roles feel they are able to be. It demands a degree of forward focused certainty that actually proves quite difficult to maintain in reality.

I learned therefore that a different kind of conversation from the usual is needed when it is not so much a problem that you are attempting to solve as a difficulty that you are trying become attuned to and find your way about in. In fact this kind of talk/thinking happens, whether we like it or not, long before there can be talk of goals, actions and other kinds of more focused descriptions. It just that it mostly happens in the confusion of our inner conversations.

Getting it out in the open and putting it, however tentatively, into words, can be incredibly useful.

My approach to facilitation has shifted as well. Early on I prepared heavily and designed each step in the process of a faciltation session with the goal of achieving a particular result. Very quickly I discovered that it is impossible to control what people talk about and/or predict accurately what their actual concerns and issues in relation to a particular situation or issue might be. There is a sense in which people will take the conversation where it needs to go. There are of course people who want to talk completely off topic, but it continues to intrigue me how small groups of people can talk about the same issue but from such different perspectives. At the same time I also learned that if you script or control the conversation too heavily you eliminate almost all of the possibility for suprise, insight and creativity. I also discovered that putting people in small groups, pairs and triads gave more voices and opportunity. This is particularly significant the more complex the issue or opportunity. Just because a person chooses not to say much in a lerge group doesn't mean they don't have a view that could generate insight when picked up by others. Some people think by talking, others think by thinking.

With this in mind these days meetings and workshops I facilitate tend to have some of the following features:

- An activity designed to metaphorically look back "upstream". That is, to develop a renewed sense of how things came to be how they are. This often happens in ways

that are active and get people on their feet, and visual, so there is an opportunity to begin to see themes, patterns and trajectories.

- Discussion starters and structures for engagement and recording that generate the multiple views and perspectives that will inevitably be in the room. Wherever possible I look for ways to make these multiple views and perspectives visible in some way and hold them open for as long as possible before seeking any closure.

- Perhaps an activity that tentatively draws out those things that the group collectively holds as quite certain and straightforward, as opposed to those things about which there is less certainty. This can often lead to very interesting discussion about where the certainty comes from (including what assumptions underpin it) and equally the nature of the complexity that surrounds the areas of uncertainty. It can be especially useful to ask at this point, "Is it something that could be known if there was enough information and a way of analysing it, or is it always going to be difficult to know in advance?"

- An element of creativity - something to shift people's thinking at least a bit and open up the element of surprise.

- Lots of moving and doing things. I want, at least to some extent, to get people out of their heads and more able to notice their bodily responses, usually in the form of emotion.

- A much stronger emphasis on identifying next steps that will lead to progress of some kind, rather than the development of big plans, and an agreement about when to meet again to see what happened and decide what to do as a result.

As much as I can these days I try to be in a situation where any facilitated session has both lead up and follow up. Good discussion before hand with key stakeholders really helps to ensure that the issues that need to be talked about get on the table.