

The Use of 'Shadow' Consulting and 'Parallel Process' in Becoming a Learning Consultancy

Professor Bill Critchley

Introduction

For many years as a practitioner of organisation consulting and therapy, I have been aware of a strange phenomenon known as 'parallel process'. I was first introduced to this by David Casey, a mentor and colleague of mine with whom I worked in my formative years as an 'Organisation Development'¹ consultant, and with whom I wrote two articles, one on top team development, and the other on understanding and working with organisational culture from a psychological perspective. Both of these have become quite well known in our field (Critchley & Casey, 1984, 1989).

Subsequently I discovered this phenomenon was well understood and written about in the field of psychotherapy, in which I was training, and used extensively in the practice of supervision²; more recently it has come to be acknowledged in the field of coaching. **Less has been written about it specifically in the context of Organisation Consulting.** David and I were increasingly bringing psychological ideas and practices into our work as organisation consultants, facilitators of action learning sets, and 'OD' consultants.

We used to meet regularly to review our work, and these meetings took the form of co-supervision meetings during which we each took some time to be the client of the other, and we tended to refer to this process as 'shadow consulting'.

When I joined Ashridge Consulting and took responsibility for professional development, I introduced **Shadow Consulting** as a process for enhancing our learning about our work, in particular our client relationships.

¹ The application of organization psychology as 'process consulting', focusing on inter-personal dynamics, in groups, between groups, and in the whole organisation

² Supervision is a form of coaching for consultants whereby one person, usually a fellow consultant, listens to a colleague talk about their practice to enable them to reflect on what they are doing, for example what contract they think they have, what kind of relationship is developing between them and their client(s). The 'supervisor' would normally be fairly experienced and would be looking out particularly for the dynamics in the consultant-client relationship. I regard supervision as an essential form of 'quality control' for OD practitioners

In talking about ‘shadow consulting’ as a form of supervisory practice, I am conflating two ideas, ‘parallel process’ and ‘shadow consulting’, which are different but co-dependent. It is important to unpack these, and I will start with the idea of **shadow** consulting.

Shadow Consulting as a process

The process of ‘shadow consulting’, involves a consultant or team of consultants, telling the story of a current piece of work in the presence of another professional, usually from a related field. The role of the ‘other’ is to listen to the story, paying attention less to the content (the specific problems, themes or issues inherent in the work) and more to the relational dynamics, between the consultant and the client organisation, as well as within the consultant team, if it is a team. The consultant project can be at any stage, beginning, concluding or somewhere in the middle. It can also be going ‘well’ or ‘badly’. Most consulting projects do not go as planned, so at the very least the consultants should be interested in reviewing their ‘progress’ (I am always chary of the word progress because it implies a destination, whereas the reality is that consultants merely participate for a while in the on-going life of the organisation – maybe process would be a better word).

The role of the ‘shadow consultant’ is a highly skilled one and I shall be saying more about this in the course of this article.

The concept of ‘shadow’

The use of the word ‘shadow’ is significant as it implies a very specific role, which goes beyond that of coach or supervisor. Taking it rather literally we could say that by looking at our ‘shadow’ we ‘see’ aspects of ourselves which are not in view, which are unlit, which shift and change shape from different perspectives, always moving, always different; the role of the shadow consultant is to highlight or reveal shadow aspects of our relationship with our clients. The word ‘shadow’ is often taken to mean ‘bad’ in some way, but taken literally it means what it says, aspects of ourselves or the relationship which are not in view.

From a Jungian perspective we could add that our shadow consists in those parts of ourselves which are unconscious and which may possibly include motives which are the opposite of those that we espouse. So for example, while we may claim that our sole purpose is to ‘enable’ a Chief Executive to whom we are consulting, we could be unconsciously pleased that he is vulnerable and dependent on us giving us a sense of power over a senior

figure. It is unlikely we would allow ourselves to be aware of such a base motivation!

Shadow as unconscious process

Psychotherapists are very familiar with the phenomenon of unconscious process, and hence with the metaphor of 'shadow', and they take it for granted in their work. Many people who work in business life, on the other hand, are rather suspicious of what they might privately dismiss as 'mumbo jumbo'. I have my feet in both camps having worked in, or consulted to business organisations of one sort or another throughout my career, **and** having trained in the psychotherapies in order to become a more effective Organisation Development Consultant, and now practice as both an organisation consultant and psychotherapist.

I do think psychotherapists tend to mystify the concept of the 'unconscious', but it can be made perfectly accessible and understandable. If you think about the fact that in our very early years the neural connections in our neo-cortex (the conscious thinking part of our brain) have not yet been made, and yet we are experiencing strong feelings in our responses to our carers, feelings which are unmediated by any conscious thinking process, it is self evident that these feelings are unconscious in the sense that they are not available at the time to cognitive inspection. Later in life, if we choose to engage in deep reflection about the nature of who we are we may **infer** something about the etiology of strong feelings, but we can never know for certain.

Such strong feelings may be triggered again in adulthood when we meet a person who, or context that viscerally reminds of us of an early experience which evoked a strong response, for example of being left alone, of feeling abandoned, let down, scared, of being made to do something, or finding ourselves in scary situations and so forth.

Even later on in our childhood, when we are capable of cognition, we may encounter situations which give rise to feelings of embarrassment, of shame, of feeling incompetent, unwanted, excluded, or at the opposite end of the spectrum, of feeling 'the favourite', the one of whom a lot is expected, the one responsible for keeping the peace in the family and so on. These experiences, particularly when they are repetitive, shape us over time, in a way of which we are largely unaware. Usually we have nothing to compare them with, and hence take them for granted; this is the way life is.

These patterned responses are by definition 'unconscious' in the sense that there may be no specific 'events' to remember; only a long running pattern of experience. Some feelings or mood states may have become an underlying substratum to our existences which are not specifically accessible or namable. We may have developed coping behaviours which enable us to

avoid or deal with situations that evoke them. For example I am particularly sensitive to being excluded or 'not wanted' by whatever group I value at a particular time. This manifests itself at work where I worry about whether I shall be asked to join a consulting team being put together for a project, so I go around looking busy and unavailable so that I don't have to face the reality of whether or not I am wanted on the team!

Some people seek therapeutic help to gain insight into this 'substratum' or unconscious when they sense something is disabling them, or impairing their ability to function well, while others get through life well enough without seeking professional help.

Most OD consultants, in my experience, have sought some form of therapeutic development because they come to realise that a keen self-awareness and well-developed reflexive capability are essentials of our trade. That is why, on entering the OD profession and realising that I was ill equipped to do this kind of work, I enrolled for what turned out to be a prolonged period of psychotherapy training. It is also why I subsequently founded the Ashridge Masters in Organisation Consulting, with the intention of combining psychological and organisation development into one programme.

In talking of 'shadow consulting' what I am referring to is the way in which unconscious or 'shadow' material may be evoked in consulting relationships. This in itself is not so difficult to comprehend; for example I have experienced meeting a particular kind of Chief Executive, usually a man on the tall side, with an authoritarian tendency, who tends to trigger in me my very early responses to my Father who always seemed slightly disappointed in me. So I start trying to impress my client. This usually has exactly the opposite result to the one I am unconsciously seeking (to be approved of) and a good shadow consultant will enable me to see what is going on and help me develop coping strategies. This we would say is mainly 'my stuff'.

Occasionally, something else happens, as well, when I meet that Chief Executive; something that's different and more complex. A **pattern** of responding to my client may evolve which is **similar in form** to a pattern of relating he is involved in in his daily work context. This is what I am calling 'parallel process'. So if, in the example above, I have the courage to say, to my client that that while I know I am pretty competent at what I do, I am nevertheless noticing my desire to impress him rather than tell him what I think he really needs to hear, he **might** reveal that he has been wondering why members of his management team rarely challenge him. Bingo! We're on to something important. A good shadow consultant needs to help the consultant distinguish between what is purely his personal unconscious

response (sometimes called ‘baggage’), and what may be indeed a parallel process.

What I want to propose is that we need to become aware of how parallel process can undermine the quality of our work as OD consultants. I also want to suggest that by becoming more aware, and learning how to work with this phenomenon, we can sometimes significantly shift the dynamics and effectiveness of our work.

I would go even further and say that we have an ethical responsibility to learn about and take account of parallel process in our work. I will now move into describing how I understand this phenomenon in the context of organisation consulting.

Parallel process

Parallel process is a phenomenon arising from the dynamic, systemic nature of organisations. Put very simply it suggests that the dynamics within an organisation are potentially reproduced between the organisation and a consultant, or within the consultant team. This can be explained by understanding organisations as patterns of interaction that simultaneously form and are formed by members of the organisation.

As a consultant engages with the patterns that configure an organisation, they participate in this process of mutual influence; the organization unconsciously tends to ‘induct’ the consultant (as it does employees) into particular patterns of behaviour, and by so doing inhibits their potential to create change. The interesting question for the consultant is whether, and to what extent they personally have a propensity for the induced behavioural pattern.

This is where the understanding of ‘shadow’ and some psychotherapy theory is useful. A pattern of interaction inherently involves both conscious and unconscious communication because this is the nature of being human, as I explained earlier. To take an example which David and I explored in our article ‘Organisations Get Stuck Too’ (Critchley & Casey 1989), an organisation pattern may be characterised by an obsessive compulsive motivation whereby the norm is to work diligently to get everything ‘right first time’, to plan exhaustively, to have low tolerance for experimentation and to suppress, or at least to not express, affect. A consultant engaged, for example to bring about change, may unconsciously collude with the pattern of perfectionism if he is susceptible to it, and only succeed in creating more of the same, so no real change emerges.

Discovering the parallel dynamics provides a unique opportunity for the consultant(s) to learn about the client, to review past, and plan future

interventions, and to learn about themselves. I now go on to outline how it can be used in the context of a shadow consulting relationship, and discuss the particular skills required of the person(s) playing the 'shadow' role, but before I do that I need to elaborate on the notion that organisations are, as I said above, dynamic and systemic in nature and characterised by patterns of interaction.

A Social Perspective on Organisations

"We are all participants"

I am proposing a particular perspective on organisations that asserts that an organisation is **not a fixed entity or thing**, but a constant process of gestures and responses between people. The members of this process of organising are all participants in creating a social process that continuously evolves into an unknown future. We cannot, by definition, get outside it; as participants we simultaneously shape and are shaped by the process of engaging together in joint action. You ask your subordinate to do something, and she responds in some way that will inevitably be informed by her values, assumptions, preconceptions and interpretations of your 'gesture'. She will not respond like a robot; she will make her own meaning of your request.

The sociologist George Herbert Mead described this process of communicative interaction rather succinctly by saying that "The meaning of a gesture is in the response". (Mead, 1967). He used the word 'gesture' to mean any communicative move, verbal or physical, towards another. While as humans we gesture with intention – for example I want to convey some information to you, ask you to do something, scare you, convince you or whatever - it is only in your response that the 'meaning' of the interaction emerges.

The interactions that we have with each other simply create more interactions. Our interactions do not add up to a *whole* because they continuously evolve. Neither is any stable or bigger *thing* behind peoples' interactions. There is no entity, i.e. *the company that* does something to people: there are only individual people relating to each other. Managers may perceive themselves as standing 'objectively', outside of *the system* in order to work *on it*, but this is an illusion, as there is no system to be outside.

"Patterns emerge without a master plan"

Although no grand master plan exists, through the multitude of local interactions overall patterns emerge. In other words, although no one is in overall control of the totality of people's local interactions, overall

behavioural patterns emerge. Complex responsive process theory (Stacey, 2000) calls this phenomenon *self-organisation* and *emergence*.

The Shadowing Context

Consultants inevitably participate in these patterns; they cannot stand objectively outside them, although as new participants they may start by being less emotionally engaged, and so maintain some level of detachment, at least in the early stages of an assignment. Over time however they are likely to be drawn unconsciously into these patterns, and the extent to which they get 'caught' by them will be determined by their own unconscious material.

This is why shadow consulting is not only potentially powerful but also necessary. Psychotherapists are **required** by their ethical codes to have supervision to help them pay attention to how they are participating in their clients' dramas. In my view we consultants owe it to our clients to do the same.

Psychotherapy, as an older profession, has come to recognize that a therapist, as an ordinary human being, inevitably participates in an unconscious exchange with their client, and indeed sees this as a key element in the learning process. However for this learning to occur the unconscious dynamic has to be recognized and explored. This almost always requires a third party (the supervisor) to help the therapist spot unconscious process. **The OD profession is less professionalized and regulated; unconscious process is not so well understood, or indeed accepted as a phenomenon, and hence supervision is not seen as an integral part of OD practice.** I think it should be, because unconscious process is an inevitable part of any consulting interaction, and not only can much be learned from exploring it, some ill effects can arise from ignoring it.

The Process of OD Supervision

A consultant or a team of consultants is working with a client organisation. At **any** juncture in the assignment, the consultants call upon a professional colleague or colleagues to join them in a review process as a 'shadow' consultant. Anyone invited into this role needs to understand the potential sensitivity of the material which may be revealed, and hence it is important that he/she takes responsibility for finding a quiet space where there can be no interruptions, and ensures that there is plenty of time.

Many OD consultants claim that ‘learning’ is core to their practice, but when they come face to face with a potential ‘unconscious’ pattern of behaviour that may well disturb their self-image or be incongruent with their espoused values, they may potentially feel some embarrassment or shame; they are, after all, human! Here the skill of the ‘shadow consultant’ in being both provocative, **and** empathetic and supportive is paramount.

It does not matter whether there is a particular problem or not, and it is important that the consultant team does not over-prepare themselves. The most important thing is that they tell their story the way it is, without ‘presenting’. It is usually helpful to describe:

- The way they see their client organisation;
- The contract they believe they have;
- The interactions that have occurred;
- Hypotheses about dynamic or repetitive patterns (of particular interest are patterns in the consultant-client relationship)
- The interventions made, and their perceptions of their impact;
- Their experience of how the client organisation has affected them;
- Their thinking about what they might do next.

Meanwhile the shadow(s) listen and observe. An important decision for them is when and how to use their ‘data’; what follows are some ideas about the different levels of parallel process which may emerge.

Working at Different Levels

The single consultant

I shall start by talking about a shadow working with a single consultant. The first job for the shadow is to reflect back what they see happening between the client(s) and the consultant, noticing any behavioural patterns (changing meetings or arrangements, controlling, avoiding etc) or emerging feeling dynamics (for example, does the consultant feel a weight of responsibility for outcomes, appreciated, used instrumentally, emotionally close or distant, frustrated etc). The first question for the consultant is whether any of these patterns or dynamics are reflected **within** the client organisation, or that part of it with which they are engaging. This will give rich diagnostic information to the consultant, and can also shape subsequent interventions.

In conceiving of an organisation as pre-existing patterns with which the consultant engages, it is inevitable, as I suggested earlier in this paper, that the consultant will become inducted into these patterns to some extent, and

that he/she will be unaware that this is happening. This has very important implications if you think, as I do, that a consultant's job is to make a difference. It would suggest that our capacity to make a difference declines as we become more enmeshed in our clients' dynamics, through which our behaviour becomes moderated, and our capacity for 'difference' is gradually eroded.

Shadow consultants can help consultants to become aware of this subtle process of reciprocal influence. If the particular nature of this dynamic is understood, the consultant can make a conscious choice to change their own behaviour, and hence **interact with their client differently** thereby evoking a different effect. In this way a consultant can induce change more powerfully than by any attempts to 'manage change', although he/she will not know in advance the nature of the change she will induce; there's the rub.

The consultant team

Often consultants work as teams and this presents the shadow consultant with rich possibilities. The first job is the same as above, but the second job for the shadow is to draw attention to the interactions **within** the consultant team. These are likely to parallel, to a greater or lesser extent, the interactions both between the consultants and the client, **and** within the client organisation, and will therefore enrich understanding of the dynamics, often, in my experience in quite unexpected ways.

The role of the shadow in this situation is to enable the consultant team to process their dynamics, and this is a subtle and sensitive task, involving drawing attention to power dynamics, inclusion and exclusion, and the habits, norms and values evolving in the team. Of course a team's dynamics are co-created by its members, **but** I am suggesting that a critical influence is likely to be the patterns and dynamics of the client organisation.

The shadow and the consultant(s)

The third job for the shadow is to suggest reviewing the dynamics evolving in the shadow process itself, including those between shadow and the consultants and between the shadows if there is more than one. The transactions between shadow and consultants are likely to directly parallel those **between** the consultants, and by inference will shed further interesting light on the dynamics of the whole field.

How to learn from Parallel process

Clearly there is much that can be learnt about the client organisation and the dynamics of the complex pattern of interactions from the application of parallel process phenomena, and an important element in the configuration

of this pattern is the consultant herself. So, as consultants we can learn a great deal about **ourselves**, about the impact we tend to have, about patterns of interaction we are likely to get involved in, and about our propensities both helpful and unhelpful. However, this kind of learning requires a real willingness to open oneself non-defensively to feedback; a commitment to see oneself as systemically part of creating or sustaining any process we are engaged in, and this can be hard for anyone who is used to the notion of consultant as disinterested, dispassionate outsider, capable of sustaining an 'objective' view of the client organisation.

The Skills of a Shadow

I will give a resume´ of what seem to me to be the essential skills of a shadow consultant, although I do this with some reservation. Most of them are almost too obvious to say, and yet in the quality of their application lies the essence of effective shadow consultancy (and a large part of good consultancy).

- Giving full and close attention
- Being fully present without a particular agenda, and without expectations of specific outcomes (creatively indifferent)
- Observing patterns, repetitions and interactions
- Noticing energy flows (intensity and quality)
- Noticing your own bodily sensations
- Allowing intuition to work on the unfolding story
- Paying attention to your own feelings and responses
- Noticing your fantasies and associations
- Reflecting, summarising and clarifying
- Giving feedback
- Offering hypotheses
- Exploring options

Developing skills as a shadow consultant can be likened to an intensive training in suspending judgement, developing intuitive capacity and hypothesis formulation, and in appreciating complex dynamics. These are core skills for OD practitioners seeking to create learning consultancies.

Copyright: Professor Bill Critchley, November 2011
1 Northolme Road, London N5. E-mail: billcritchley@me.com
www.billcritchleyconsulting.com

|

- CRITCHLEY, B., & CASEY D 1984. Second Thoughts on Team Building. *Management Education and Development*, 15, Pt. 2, 163-175.
- CRITCHLEY, B., & CASEY D 1989. Organisations Get Stuck Too. *Leadership & Organization Development Journal*.
- MEAD, G. H. 1967. *Mind, Self and Society from the Standpoint of a Social Behaviourist.*, Chicago, Chicago University Press.
- STACEY, D. R., GRIFFIN, D., SHAW, P. 2000. *Complexity and Management: Fad or Radical Challenge to Systems Thinking*, London and New York, Routledge.