MEETING THE CHALLENGE OF THE CASE

by Philip Boxer and Barry Palmer

Abstract

The paper explores the place or position taken up by anyone acting as a consultant. It is not primarily concerned with consultancy techniques, but with the ethical and epistemological assumptions which shape what the consultant does. The main work described is a series of workshops and its underlying assumptions about the nature of the consultant-client conversation. These assumptions underpin the design of the series, and two cases are used to show something of the process which resulted. In the authors’ view, the challenge of the case is always also a challenge to the consultant’s practice. They hope that they succeed in sharing something of this challenge with the reader.

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Introduction

In early 1993 we ran a series of three workshops for practicing and aspiring consultants. Our aim was to explore and generate understanding of the place or position taken up by anyone who undertakes to act as a consultant to any client system. We were not primarily concerned with consultancy techniques, but with the ethical and epistemological assumptions which shape what we do.

We ourselves are independent consultants, and so have had plenty of opportunities to think about this. Boxer works primarily as a strategy analyst with business organisations. He was at the London Business School, and is now an Associate of HKA Ltd and an Associate Member of the Centre for Freudian Analysis and Research. Palmer engages in organisation and management development, team-building and training, mainly in the public and voluntary sectors. He is an Associate of the Grubb Institute, OPUS Consultancy Services and Randolph Enterprise. In the course of this work we have found ourselves subject to, and responding to, a range of expectations: to come in as experts and fix something, to offer a diagnosis of an organisational dysfunction and propose some treatment, and (less frequently) to join our clients in their bewilderment and stuckness and work with them to find a way forward.

For us this poses epistemological and ethical problems. What is the status of the knowledge which we bring to, or generate during, this work. Or if, as we believe, we can have no certain knowledge or unquestionable theoretical framework, what is our justification for offering our services and accepting people's money? Worrying away at questions like this has led us to attempt to articulate the demands of consulting from what we have called the position of the 'fool'. This is the subject of this paper.

We have come to distinguish between three basic postures (cf Schein, Mintzberg):

- **bird**: the position of the consultant as expert, who supplies know-how which he or she is believed by the client to have, to solve a problem as identified by the client. (The term is mildly derogatory: the bird flies in and flies out again, leaving behind a solution to what is assumed by both consultant and client to be a known problem - a solution which, as long as the problem persists, may or may not prove to be welcome.)

- **guru**: the position of one who is asked by the client to use his or her insight and theory to define what the 'real' problem is behind the 'presenting problem' identified by the client, and to formulate what can be done about it. (Schein calls this the doctor-patient model, in which the process of diagnosis as well as the 'cure' are prescribed by the consultant.)

- **fool**: the position of the consultant who Schein called the process consultant. Here the client accepts the process of diagnosis of what the 'real' problem is as being problematic. In response to the 'identified problem' put forward by the client, the fool, like the client, accepts not knowing what the 'real' problem and its solution are, and is prepared to work with the client in a shared ignorance, learning with him or her the hard way how things can be different.
Although the blank position is one where someone can be providing a solution to a problem someone else has defined, it is not really a consultancy mode, though it is not unknown in practice: the consultancy firm sends along an apprentice consultant who knows how to apply a 'solution', but who has the opportunity to learn from the client what the problem is, at the client's expense!

Consultants may move between these positions during the course of a consultancy assignment. They form a repertoire of positions, in which we focus on the third mode not only because it is reached through the other two: but also because we believe it provides a stance from which to sort out the ambiguities into which consultants repeatedly wander, and which, in Winnicott's phrase, is a necessary condition for 'meeting the challenge of the case'. Examining this stance leads us into intellectually and emotionally deep waters. It entails identifying the sources of our certainties and positioning ourselves outside them (although we know we never can); and hence steering into the unconscious anxieties from which we and our clients defend ourselves.

The workshops

We ran our series of workshops to explore this third position. The three workshops were run under the auspices of the Institute of Group Analysis, and constituted a single course. During the course participants were invited to present a current case, up to three times, and the rest of us acted as consultants to them. This is how we outlined the aims of the series:

"In this series of workshops we shall explore what it means to take up the place of a consultant in an organisation - whether as a manager or as an adviser. The aim is to give participants the opportunity to examine and develop their own practice.

In successive weekends we shall focus upon the activities of formulating, hypothesising, intervention and critical reflection through which we endeavour to 'meet the challenge of the case' and to face the questions which impale our practice. We shall be examining what is lacking in how participants seek to understand and work so as to open up new possibilities.

Participants will have the opportunity to examine this in small groups. This will involve adopting a 'Plus One' role from which to formulate questions for the group about what is ignored or 'bought into' without question in its deliberations. There will also be plenary sessions for theory and reflection."

The case material used in the paper is based on our notes from the workshops.

To give you an idea of the design of the workshops:

- participants moved between consultations in small groups, working on their cases, plenary sessions in which we endeavoured to look critically at these consultations, and spaces in which participants were invited to use a journal to record their reflections on their case;

- we provided theoretical notes for each weekend, which we introduced on the first evening. These covered speaking and listening (discussed here), power and knowledge, the theory of dilemmas, organisational viability and identity, and the impossibility of the 'Plus One' position (also discussed here).

- in every small group consultation one participant took what we called a 'Plus One' role. The task of the Plus One was to listen critically to the client-consultant conversation, and to formulate questions about the account of 'reality' which was being constructed through this conversation. These questions were raised in the plenary sessions.

- the Plus One was a visitor from another group, except for the last weekend when the person presenting their case was the visitor. This meant in effect that every small group consultation was a new grouping of participants and consultants.

- we took part in the small groups in the same consultant role as other participants, but did not take the Plus One role. In this way we sought to avoid the Plus One role being identified with a guru position - not always successfully.
• in the periods between workshops participants continued to work on the projects they were presenting. We regarded these periods as an integral part of the workshops series.

**The three weekends**

The three weekends, which were five to eight weeks apart, were designed to focus on successive stages in a consulting process:

1. In the first weekend, the presenter spoke about a case, and group members listened and offered readings of what was going on.
2. In the second weekend the presenter again described his or her case, but now presenter and group were invited to listen to this account, and to read it in terms of dilemmas in the client system - dilemmas which were manifesting themselves in the stuckness the presenter was being asked to address.
3. In the third weekend, the presenter again spoke about the case, but this time from the point of view of what they were learning about their own practice. This time presenter and group were invited to listen to the way the presenter was listening to her/his own account. In other words all of us moved towards a Plus One position.

In each weekend we suggested that those taking the Plus One role should focus upon a different question. In the first weekend the question was:

**Are the presenter and consultants placing too much dependence upon one account of what is going on?** (Are the consultants buying in to the presenter's story, as though he or she knew and could give a total description of the situation?)

In the second weekend we suggested they ask:

**Are the presenter and consultants assuming that there is a right way to interpret the presented problem?** (e.g. is a psychoanalytic or group analytic or systems frame of reference being accorded unquestioned authority?)

In the third weekend, as we have said, everyone was in a Plus One role. Our questions was:

**Where do the presenter and consultants 'draw the line' round the problem? Is the line being drawn in a way which includes or excludes themselves?** (Who is part of whose problem in the problem-as-presented, and are the presenter and consultants able to formulate the problem in a way which includes themselves?)

This third question pointed to what we regard as an essential aspect of the fool position which we pointed to in the pre-series flyer, quoting Robin Skynner:

"The [consultant] automatically selects the ideal clientele in which to study himself or herself vicariously...... though the knowledge cannot benefit us..... until we acknowledge the fact that our work, however useful, has also been an evasion of the truth about ourselves."vi

Since a consultancy project is an episode in the life of the consultant, as well as in the lives of others who make up the client system, becoming aware of the ‘real problem’ means becoming aware of a question about what we are up to, as well as what other people are up to - the question of our own desire in the matter. As we listen to our own interpretations, we become aware of how they are shaped by the desire of the one who formulates them, as well as by 'what is going on'. In Eliot's words:

"....every moment is a new and shocking Valuation of all we have been."ix

This is not to suggest that we should not make interpretations - only that in doing so we should act in the knowledge that we are doing so. It is in relation to this knowledge of our own participation that we find what is characteristic of consulting from the position of the fool.
The consultant-client conversation

We explained the rationale of the design of the workshop process (and our view of the consulting process) in terms of the nature of the speaking and listening which takes place in a conversation. Everything said is said by one to another – thus even when you are speaking to yourself there is a listener. The presenter’s account can therefore be understood as an endless chaining of speaking behaviour, so that any listening to this chaining involves selecting from the chain retrospectively – what we call ‘punctuating’ the chain. This punctuating can be thought of as a backward movement which makes sense out of the forward movement of speaking. Thus listening ‘frames’ the reality conjured up by the speaking through the way it punctuates the speaking chain:

In the consultant-client conversation we can therefore distinguish between two positions:

- that of the manager or client who describes what is going on, and takes up the position of ‘client system’ for the consultant in their account;
- that of the consultant, who listens to the account coming from the client system, and forms a view, not only of what-is-going-on, but also of the client’s view of the what-is-going-on. This view is expressed in an interpretation of the client’s view:

Such a conversation implies two other positions, from which it is impossible to speak, though sometimes we speak as if we could:

- That of ‘what-is-going-on’ - the organisation as it ‘is’. The distinction between reality and fantasy implies the possibility of taking up this position; but in practice any account of this reality is always mediated by the speaker;
- that of a ‘Plus One’ process, which continues outside the consultant-client conversation, and seeks to articulate what is ignored or excluded by the terms in which the client’s situation is described and interpreted. Inevitably, the conversation constructs readings of the situation which highlight some aspects of the situation and how they are to be understood, and obscures others. It is like a torch shone into a room, which picks out what the beam strikes and leaves other things in darkness. The ‘Plus One’ position is an active refusal to forget this.

The three questions we have already discussed point towards this ‘Plus One’ position. The above diagram is adapted from Lacan’s terms. In Lacan’s terms, these questions are ways of probing what is wanting in the...
situation as described - in the colloquial phrase, what is left to be desired. The concept of desire is important in Lacan and in the scheme we are presenting. The client presents a problem. He (or she) cannot simply sit there and weep, so he formulates a problem and a request to the consultant in words. Of course the client may speak and weep (although it is unusual), or in some other way his desire may bend or trouble what he is saying. But even after everything has been said that can be said, still what is said in words can never express all that was in the weeping. That which remains left out, that which is left wanting, shows itself to us as what Lacan refers to as 'desire'. From the Plus One position we may note that something is not being said, and we may try to articulate what that is. But of course whatever we actually say is also inevitably lacking: it is uttered along the client-consultant axis, and is itself subject to the scrutiny of the other axis.

This second diagonal which we introduced into the diagram is an impossible axis. We suggest that the challenge of the case is only addressed insofar as the conversation is oriented in relation to this other axis: thereby becoming a continuously seeking after discovering 'what-is-left-to-be-desired' in relation to 'what-is-going-on', in the full knowledge that it can never be pinned down; and therefore a continuous asking of what the conversation as it is being conducted is causing to be ignored (forgotten: the word for truth in Greek is 'αληθεια' - 'unforgetting').

This Plus One position must always elude us, because what ever we think and say is in language (or, in Maturana's terms, in 'languaging') and therefore embedded in its own assumptions. While we can do useful things from a bird or a guru position, our work is limited in its influence unless we are able to take up this fool position in which we know that we know nothing. The fool position is thus a sceptical position (not to be confused - as it often is - with the position of the cynic):

"Scepticism does not mean the successive doubting, item by item, of all opinions or of all the pathways that accede to knowledge. It is holding the subjective position that one can know nothing.... Scepticism is something that we no longer know. Scepticism is an ethic. Scepticism is a mode of sustaining man in life, which implies a position so difficult...... that we no longer even imagine it....."

We shall illustrate this progression of positions by describing (in a fictionalised form) how two cases unfolded through the three weekends.

These accounts seek to communicate the process of the two consultants’ experience. The content is an amalgam of several situations known to us - in other words, fiction.
Janet

I - Telling the problem

At the beginning of the course Janet introduced herself as a probation officer who had risen from the ranks to the position of Assistant Chief Probation Officer in the East Midlands service. She had become disaffected with the way probation was going, and had accepted an invitation to join a friend in the voluntary sector who was chief executive of a national organisation recruiting and deploying volunteers (the National Federation of Volunteer Centres). She was in her mid-fifties, and had joined the course because of concern about the management of expansion in the NFVC.

She began her session by launching into a description of what was happening in NFVC, without saying what she wanted from the group. There were about 250 volunteer centres within NFVC, throughout the UK, providing volunteers for local welfare and environmental projects. The NFVC supported these centres by providing information, advice and training, making recommendations about standards, and representing their interests at a national level. It was funded by the Home Office and a levy from local centres.

Janet had worked with the Director (Tom) for 12 years, and was now Assistant Director in charge of their five regional coordinators. Initially she and Tom had been the total HQ team; later they grew to a team of four.

Eighteen months ago, Tom had organised a merger with another agency. Janet had not been party to this decision and had felt alienated when she was told. Tom had agreed with the Director of the other agency, Charles, that he should become an Assistant Director and continue to coordinate, and be responsible for, his two coordinators, who serviced voluntary advisory agencies in the north and south of Britain. Janet had thought this was ridiculous: now they had two teams of coordinators, sometimes servicing groups of volunteers in the same town or county. Janet described ructions in the management team. They would shortly be moving into a new building in Birmingham, and would be together under one roof for the first time. She feared that if she could not contribute to the managing of all this, the organisation might disintegrate; but if she was successful, she feared that they might find they had one manager too many, and Charles would take over her job.

The responses from the others listening to her account were:

- One person said Janet had presented a no-win situation. She attracted a lot of sympathy from the group on the course. It was all the Director's fault.
- One saw a parallel with the centres they served, which were often run in amateurish ways: the Director had behaved unprofessionally too.
- One saw all this as a response to a world which was increasingly threatening to charities. Money was tighter, there was pressure for more accountability. Charities were being forced into trying to make economies which jeopardised their raison d'etre.
- Some interpreted her story as though it was dream material, asking no questions which suggested that they wanted to know more about what was going on.

Janet appeared initially to have taken over the group, and the group in turn appeared to have swallowed her view of things whole. They were making no distinction between what-was-going-on (or what was going on in her inner world) and Janet's reading of all this. This created the illusion that they had direct access to the real problem, and could fix it (if only they knew how).

II - Hypotheses and dilemmas

At the beginning of the second weekend Janet said she had gone away feeling much greater clarity, and had used this clarity at various meetings. But she felt it has been 'too clear and too easy'. Had it been consultation or therapy?

This time she wanted to talk about the relationship between the HQ staff and organisers and the local volunteers and their committees.
All were locally run and most were charities in the own right. They used the services of NFVC, but few of their members were interested in anything beyond their local scene. HQ were under pressure from the Home Office to demonstrate that their funding was well spent. They were also aware that the Charity Commission were tightening up on the management of charities. HQ had a policy of requiring local centres to introduce more quality control of volunteers, to tighten up their accounting systems, and to participate in nation-wide campaigns about things like the care of the elderly and environmental concerns.

But regional organisers (RO's) had a very variable impact upon individual centres. Some established effective relations and influence, others didn't. Local centres seemed to wait until the RO had gone away and then continue as they had before. To make matters worse, representatives on the central Council of NFVC were putting pressure on HQ to do more for them, and some were saying they might have to reduce their subscription.

Janet drew a diagram of the organisation to explain this, which represented the RO's as managers with the local centre committees under them. She talked about the professionalism she had learned in the probation service, and her frustration at the vagueness of her RO's and of local centres.

The group seemed to be having difficulty seeing the situation from any perspective other than that offered by Janet herself. She read the situation through her probation management spectacles, and her frustration at the vagueness of her RO's and of local centres.

So one reading of what was going on was that the more Janet and HQ sought to control the activities of local centres, the more local centres resisted and asserted their self-help values...and the more the local centres asserted their autonomy, the more HQ sought to get them to adopt national standards.

In this session the group were restricted by assuming that Janet's way of interpreting her own problem - as one of deviance from a normative hierarchical structure - was the right way (cf second critical question). The analysis of the situation as a dilemma offered a way out of this restricting perspective. At the third weekend it became apparent that the analysis had in fact been releasing for Janet.

III - What are you up to?

In the third weekend, we asked each presenter: what questions has this project raised for you about your own practice? Janet reviewed what had been happening to her during the course. Before the first weekend she had been off sick for eight weeks, and was ambivalent about going back - hence her anxiety about being squeezed out by Charles and the new organisation. She could now see how the group had 'bought' her version of the story, and not asked questions which would have brought to light how her own anxieties were shaping it.

She said that the second weekend had clarified a dilemma in the organisation, which she saw as top-down versus bottom-up. She had written a paper about this, to be presented to her colleagues shortly.

She had been thinking about Skynner's dictum (referred to earlier) that we choose organisations in which we can engage with our own conflicts, either to perpetuate them or to understand them and move on. Had she used her career to explore her own preoccupations with delinquency and control, and had she now got to change in some way? People responded to her professional persona, but she felt the course had touched something more personal.

She then talked about the situation in her own life, in which her husband had taken early retirement and was asking her to wind down and spend more time with him. She felt that her anxiety about this - about the possibility of being bored and losing all meaning in her life - had led her to cling to her job in the NFVC and to control the local centres, so that she had been unable to contemplate other options.
From these reflections, it appeared to us that Janet had moved closer to the challenge of her 'case', which was not just a cluster of management problems, but a problem in which the question of her own desire as a subject could no longer be ignored.

Tristan

I - Telling the problem

The Reverend Tristan had trained as a group analyst, and since he had given up his normal parish duties, had acted as a consultant to a number of different dioceses. The case he brought with him was a community in the north-east of England - a very depressed, dying new town which was in the process of reverting to its original boundaries.

Tristan had been asked by the Chairman of a group of 20 clergy to see whether he could do anything to help them stop the community breaking up, and had agreed to meet with them every other week at their weekly two hour meeting. His brief was to help the group cope with what was going on in the community, work together more as a team, and learn to complement each other.

The group of clerics were at each others' throats. They were a mixture of Anglicans, Methodists, Catholics, and Free Church with individual clergy in positions ranging from being legally responsible for the community to being private chaplains to those who paid the stipend. The clergy faced vandalism and murder in the community, and as a group were themselves split into two - the right wing high church clergy versus the low church and nonconformists.

Tristan worked with the group for a year, during which time his role became one of stopping them being horrid to each other. Tristan had been invited into the community because of his connections with the Bishop, and was even referred to at times by members of the group as "my lord bishop". Paid nine months in arrears from diocesan funds (the nonconformists paid nothing), he was wondering what he got out of it. Was it the pleasure of keeping a Christian community going?

Three months ago, the group had announced that "everything was under control". But the Chairman didn't want Tristan to leave, and at that point, Tristan's question had been: "What do I do? What should my role be now?" His answer had been to hold a two-day conference to find out. The conference was coming up in two weeks.

Tristan’s own comments on the situation was that he felt very torn. The group was ready to explode when he left, the problems were going to go on for ever, and in effect all he had done was take on their dependency needs for a while, and then give them back to them. The question was what to do with the leadership. They needed an independent leader.

The rest of the group had a number of reactions:

- The clergy were collecting the violence and fragmentation of the community, and without a leader they lacked the commitment and structure to contain this.
- There was a tension between the group-analytic ideal that people should become independent, and the need to deal with the organisational lack in the community.
- Tristan’s presence, supported by Anglican and Catholic churches who were paying, was concealing questions about the nature of the collaboration between the churches.

Tristan’s comment at the end of the session was that he felt the listeners had theorised about the situation with very little information, that there had been no difference between the speaking and listening positions, and that both positions had appeared to know what the problem was - i.e. how to leave decently.

II - Hypotheses and dilemmas

Tristan had felt that the first weekend had been very powerful - it had taken him a week to recover, and he had felt reluctant to come back. This suggested that more was going on for him than his comment at the end of the first weekend had indicated. The two-day event had happened. It was the first time the clergy had got together with their respective heads for six years. Following the event, he had agreed to write a report on what had happened.

Only two people had turned up in clerical garb on the first day - Tristan and the Bishop. The senior clerics started out being very critical,
and fed up with the Ecumenical project - there were too many clerics for
the number of souls. The clergy had argued how good the process had
been with Tristan, and by the beginning of the second day, the senior
clerics’ views had changed - they began to see the team as working in the
Slough of Despond.

But as soon as the senior clerics left on the second day, the whole
thing blew apart. Everyone went off on their own hobby horses. Tristan
was identified as the hated bad guy, and there was no attempt made to
plan for the future. In effect, the group had returned to where it had
started, but worse, because now it had tried being supportive and it hadn’t
worked. Now, the only thing which united them was being against the
seniors: they needed more money and more people, and the seniors had
said no.

The hypotheses about Tristan’s position were that he

• had got himself into a Messiah position and become too
  identified with their position,
• was trying to ‘contain’ them and be a kind of meta-cleric,
• was the little boy with the finger in the dike as far as the group’s
  relations to the community were concerned.

These were seen as being responses to a number of dilemmas running
through the situation:

• Ministry as being about rising above the particular situation to
  see the general good in it versus communion involving engaging
  with the particular nature of each others’ concerns
• To intervene involving understanding the situation versus not to
  intervene meaning not wasting any more time and effort by
  getting further involved with the situation.
• If the group can sort itself out it can help the congregations
  versus if it helps the congregations it will come together
• The group’s role is to hold together in order to be able to contain
  the community versus if the group lets go owning the
  community’s problem and can carry its differences, then perhaps
  it can work something through for itself.

• Our vocation is to do good works. If we do, money will come
  versus Our duty is to help this community but we can only do this
  if we have the money to do it with.

These dilemmas added up to a questioning of who the client was, and
what was the basis on which intervention was possible. By articulating the
various positions possible in relation to those dilemmas, the group at the
same time resisted identifying with any one of them, and thereby losing
the Plus One perspective. But Tristan was certainly left at the end of the
second weekend with a question about his approach to intervention.

III - What are you up to?

By the time of the third meeting, Tristan still had not written his
final report, and was in a quandary over how it should be written. At the
beginning of the workshop series, he would have written a pure ‘guru’
report. Now he was not so sure.

At the last session of the two-day event, the group had been very
pleasant, but there had also been a lot of resentment that Tristan was not
staying, couldn’t cope and didn’t have an answer. Tristan wondered what
his role had been. He had been included, but had not been part of the
system. Had he been unable to resolve their questions for them because
he couldn’t resolve them for himself? How helpful could it be to act out the
needs of the people you were called in to help? Was it self-indulgent to
try and solve your own problems through the client system? Where do
you stop - where do you draw the line?

The problem with taking up the position of a priest was that he had
been unable to be there for himself. In effect he had only existed for
others, and insofar as he had been able to pursue his needs, it had only
been possible via the needs of the others.

The invitation for Tristan to manage the meetings was a
‘presenting problem’, but doing that alone had not been adequate for
addressing their stuckness. Had Tristan over-identified with his group
analytic method and his priestly role? Had this rendered him unable to
adopt a ‘Plus One’ perspective in relation to the form of his own
engagement with them?
Tristan left the workshop series with some very different questions about his practice from those he started with.

**Conclusion**

Did we succeed in our aim to explore and generate understanding of the place or position taken up by the consultant? We think we did, although the participants and ourselves were left with the question of "where do we go from here"? We saw that we had a lot of work to do to elaborate elements in the approach which we had so far only touched upon, including our way of understanding organisations. But we felt that we had shared something of the problematic nature of the practice of consulting, and a way of working with it.

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**Endnotes**

1We are grateful to Lina Fajerman for her valuable comments on an earlier draft.


2It is a position in which the consultant (and the client) have to deal with their own anxiety around not knowing - not knowing what to 'do' about the presenting problem; and working with a faith in their own resourcefulness in being able to respond appropriately to the problem-as-presented. Hence "learning the hard way". This is the position which involves what Lacan refers to as 'paying with one's being' in *The Seminar of Jacques Lacan 1959-1960: The Ethics of Psychoanalysis. Book VII* Tavistock/Routledge 1992. It is further developed in Boxer's (unpublished) paper (1994) on the Ethics of Psychoanalysis.


5Cf Hampden-Turner, C (1990), *Charting the Corporate Mind*, Oxford: Blackwell


A way of formulating this is to say that the ethic of this direction is constituted in a passion for ignorance.
