

## A Twelve-year Organisational Consultancy to a Health Care Company

## Una Consultoría Organizacional a lo largo de Doce Años a una Empresa de Atención a la salud



Marianne Wiktorin (Sweden)

Marianne Wiktorin is a senior management consultant, licensed individual and group psychotherapist, specialist in psychology and Director of Psychodrama. Trained as an organisational consultant, she has consulted to companies and to the public sector for twenty-five years.

Marianne, board member of IAGP, has developed and implemented 'the Organisational Stage' and 'the Art of Consultation', training programs for managers and consultants using Action Methods and Systems Thinking.

[marianne.wiktorin@animera.se](mailto:marianne.wiktorin@animera.se)

### **Abstract**

This article will address and describe an extensive and successful twelve-year consultancy to a health care company. My contribution as a consultant consisted of highlighting and working with the different life phases of a small dynamic company. I used a set of methods and interventions. I assisted the owners during the start-up of the company, as well as during its growth and expansion, and finally during the close-down. The organisation was initially flat and only the owners were employed. They had no manager and a CEO only on paper. All responsibilities were shared. Later, during the growth of the company, new people were employed, and a hierarchy was introduced. Roles and role systems changed considerably and needed addressing and working through. The subsequent phases in the life of the company all involved considerable role changes. Eventually several of the owners retired. The company was bought out and a new management took over. The consultancy finished after twelve successful years.

Consultancy methods used: Action Methods, visualising the organisational system and role systems, role training and role reversal, team training, feedback and reflection.

### **Keywords**

Organisational Consultancy, Healthcare Company, Action Methods

### **Resumen**

Este artículo abordará y describirá una extensa y exitosa consultoría de doce años para una compañía de atención médica. Mi contribución como consultor consistió en destacar y trabajar con las diferentes fases de la vida de una pequeña empresa dinámica. Usé un conjunto de métodos e intervenciones. Asistí a los propietarios durante la puesta en marcha de la empresa, así como durante su crecimiento y expansión, y finalmente durante el cierre. La organización era inicialmente plana y solo los propietarios trabajaban como empleados. No tenían un gerente y un CEO solo en papel. Todas las responsabilidades eran compartidas. Más tarde, durante el crecimiento de la empresa, se contrataron nuevas personas y se introdujo una jerarquía. Los roles y los sistemas de roles cambiaron considerablemente y fue necesario abordarlos y trabajarlos. Las fases posteriores en la vida de la empresa implicaron cambios considerables de roles. Finalmente, varios de los propietarios se retiraron. La compañía fue comprada y una nueva administración se hizo cargo. La consultoría terminó después de doce interesantes años.

Métodos de consultoría utilizados: métodos de acción que visualizan el sistema organizacional y los sistemas de roles, la capacitación y la inversión de roles, la capacitación del equipo, la retroalimentación y la reflexión.

### **Palabras clave**

Consultoría Organizacional, Empresa de Salud, Métodos de Acción.

## DESCRIPTION OF A HEALTHCARE COMPANY AND A CONSULTANCY

My client, the owners of the healthcare company, approached me for consultation. In order to manage to run a small business, they needed to develop a whole new set of roles. They were starting their journey as very enthusiastic but inexperienced entrepreneurs lacking the appropriate roles, identity and skills. They feared the feelings of ambivalence connected with this rather dramatic change of identity. They feared not having enough skills to tackle new unknown responsibilities, financial demands and team collaboration.

I had moved from being an individual- and group psychotherapist to becoming a consultant working with management training and team-building. My challenging professional journey was the same as theirs and that is why they trusted my competence from the start.

### Trust?

There was a hidden crucial unanswered question: would the owners develop trust in and between themselves? Unless they would dare to be open with their feelings when successful and also when failing, they would not manage to develop trust and the new roles needed for the company to survive and grow.

Some of the owners of the company were familiar with Action Methods from before, some were not. In a company setting, it is important to start with a familiar setting like round-table talk before slowly warming people up to these new and somewhat unfamiliar, but powerful and useful methods. Your task is to assist in creating conditions for a healthy company structure, constructive boundaries and suitable processes, not the contrary, which sometimes may be seen in unprofessional interventions.

### Unusual long-term consultancy

In this article, I will describe the development of the company, their owners and employees, and how I used Action Methods as well as other interventions in my consultancy.

Having the opportunity to consult to company for twelve years throughout its full life cycle, was a privilege and a great honour, as well as an interesting and learning experience. It is to be considered unusual and references of such an extended consultancy with the whole company have not been found. The article thus has a didactic value for consultants and future consultants. In order to enhance learning, the description is quite detailed on methods used during different conditions in the life-

cycle of the company. Company structure, hierarchy and ensuing processes have varied considerably over the twelve years necessitating different consultancy methods and approaches.

### The start of the consultancy

The healthcare company was launched by five women. They were united in a clear vision and strong values: management of the business was to be handled in cooperation, all decisions were to be made by consensus, influence and power were to be distributed equally between them in this flat organization. "No hierarchy, no boss and a CEO just on paper". Their experience of public administration's many hierarchical levels, underdeveloped leadership and inadequate communication had been very discouraging. All of the women decided to leave this inadequate hierarchical system - and they bravely looked for something new. They had a common wish to create a profitable company based on the skills, qualities and values of the five, subsequently six, owners.

During the first few years, we worked to improve their professional role system. They developed new, previously missing roles. It was a challenge but necessary: to transform the role of *the skilled employee* to the one of *the skilled entrepreneur*. Another, almost overwhelming role transformation for them, involved finding a new way from *unfree, secure monthly wage-earners* to *free insecure profit-finding entrepreneurs* (Wiktorin & Platander, 2015).

Professional quality and competence are necessary but not sufficient conditions for creating a profitable company. As we all know, entrepreneurial skills require a whole new complex role system. The owners met this challenge.

### A mutually respectful and listening attitude

The owners succeeded in creating a profitable company, a demanding process, both practically and emotionally. All six of them were working in and simultaneously maintaining the flat organisation. Of course, there were differences of opinion as well as frustration in their communication. But - and here we can regard them as unique - they generally managed to maintain a mutually respectful and listening attitude. Disturbances due to differences or differing perceptions were first made visible and then integrated. The owners were supported in creating mental space for differences, usually by finding the common denominator and managing to bridge the differences of opinion and integrate them in a constant dialogue.

## Conflicts were solved

The absence of the usual climate of debate was liberating. Often, in organisations, people advocate their personal view in a powerful way. Often no one is really listening. In contrast, the owners of this company retained a professional and human attitude towards each other - even in the case of unavoidable crises in the life of the company or in the private life of the partners; even then, when it is hardest. They were open to consultancy interventions and saw consultancy efforts as a valuable addition to their development as entrepreneurs and as team. For the most part they managed to transform frustration into manageable proposals for change-keeping the goal and the professional role in focus.

## We are employers....

Eventually, the six entrepreneurs became *employers*, as they expanded the business and started hiring people. The company moved from a flat structure to having two subsystems and two hierarchical levels: the employee role added to the roles of professional and skilled entrepreneurs. We outlined and defined the demands of the employer role. The owners found it amazing to be running a profitable company and needing to employ people. None of them had imagined that they would face this complexity and the new role of employer. Now they were not only partners but also managers.

## Does the company have a life after us?

For a long time, the '*company*' was equivalent to the founders, the owners, with no independent identity. On paper, the company was a legal entity, but emotionally a part of the identity of the founders. This is often the case also for family-owned businesses. Eventually, a decision matured: the company must survive on its own. If and when the founders leave, the company will not be closed down. The company may survive, can survive, must survive even when the founders leave. To arrive at this decision was a process over several years. Before being worked through, this question and others occupied a great deal of space and energy. But eventually agreement was reached. The owners were relieved. Not until then, when the founders could 'let go' of their creation, was the latent energy released. The company had its own life. The company was to survive in its own right.

## Hierarchy brings out strong feelings

To ensure the company's survival, new employees were gradually recruited. The organisation eventually has several subsystems and several hierarchical levels. The flat organisation - the pride of the female owners - changed. Certainly, it was wishful thinking to hope to preserve the flat organisation when growing and outgrowing the old context. This was not

possible nor an efficient way of managing an organisation with employees. But still, the dialogue that was formerly so fruitful, vanished more and more. The communication changed from one of great trust, openness and equal status. Instead differences in position affected and aggravated communication. Even though good-will, openness and participation were rewarded, a 'we-them' climate developed. In the split, conceptions, frustration and some prejudices grew.

## Power - powerlessness

In most organisations, differences in hierarchical position, although necessary in that context, tend to create gaps and misunderstandings in communication, resulting from differences in power from position. In a hierarchy, there are therefore inner representations of the power - powerlessness dimension as well as denial of this complex power - powerlessness aspect. This very central theme in organisations, often sadly overlooked, is best addressed by a professional third party who has the task of *containing* and wisely handling the strong feelings of the theme of power-powerlessness.

## Eventually everyone participated in the consultancy

In the beginning of the organisational development consultancy, only the partners' management team participated. Eventually, everyone in the company participated in order to build the *new* company. The basic values were conveyed and emphasised by everyone. The topic of power-powerlessness was addressed. We investigated the images of each other and each other's roles. It turned out that the hierarchical divide can be partly bridged by a crucial intervention: The clarification that complicated emotions may originate from position, and not from person. The divide may be all about the inherent characteristics of a system. The insight after setting up the hierarchy in action was dramatic. When it had fully 'landed', energy was released. A calm and trustful state once again prevailed. The group further became aware that difficult emotions sometimes also arise from the challenges in different stages of group development. Feelings may emanate from role qualities and group processes, rather than from the personal qualities, a helpful insight.

## Separation and complexity

Eventually, two of the founders finished participating in the daily work of the company, but retained ownership. The employees became part-owners, after buying shares. Later in the same year, another employee was hired. The company was now no longer a unitary and straightforward organisation, but a complex structure including partners as well as directors, small shareholders with influence at the Annual General

Meeting, but not on the Board, non-employed partners and a newly hired employee with no ownership. The role system of all different role holders was elaborated in action.

### **The consultancy assignment**

The consultancy consisted of around six to seven half-days per year. The methodologies used were *Action Methods*, team-training activities (Wiener, 1997), group process work and sociodramatic interventions aimed at clarifying and visualising the organisational system. Some examples are given below.

#### *Role systems of the organisation – finding, shaping and shouldering one's roles*

The tasks of the organisation are performed by role-holders. The roles are functional for the task when role-holders/role-players can match role interpretation with role requirements as well as possessing suitable skills. Moreover, in management, teams and project groups, the roles of all need to work jointly and constructively towards the goal. The role systems can be analysed in several ways; descriptively or in action. The purpose is to create a common picture of role requirements and role complexity. 'How it is' is identified and contrasted with 'how it should be'. Role clarification and role training support the group in shaping and shouldering the desirable roles.

How did the entrepreneurs expand their role system? It was one important task of mine as a consultant to assist them to be open to and understand the need to expand and change their role system. New conditions for the company demanded new relevant roles. Role mapping of new necessary role clusters helped include the new roles in their professional repertory through role training and other techniques. As mentioned previously, it was a challenge but necessary for them to transform the role of *the skilled employee to the skilled entrepreneur*. Another, almost overwhelming role transformation was to find a new way from *unfree, secure monthly wage-earners to free insecure profit-finding entrepreneurs*.

#### *Role training*

The entrepreneurs of the health care company had a conflicting relationship to making money, a dilemma that had to be overcome in order for them to run a business. We could successfully de-dramatise this issue in role training and find and own new roles of pride and quality in being entrepreneurs. We trained these relevant role skills in dynamic interaction.

#### *Organisational future scenario:*

over the years, foreseeable futures were visualised and dramatised. For example, the creation of a timeline,

where the entrepreneurs set the time for the intended shut-down date, visualised the individuals' and the company's prospective future. In a flash, the necessary action options appeared for everyone at the same time and provided the basis for strategic work. The future scenario work was supported through the design of sculptures, vignettes and role reversals with various actors in the surrounding world.

### **Team Training activities**

The result of a personality profile test showed strengths and weaknesses for the individuals and what that meant for the company. By recognising the lack of some necessary abilities, one can begin to compensate for these shortcomings. The profile analysis increases self-awareness and understanding of each other's differences in ways of working and communicating. Stubborn behaviours suddenly become understandable with a smile of recognition. Communication was facilitated. We also worked with the phases in a group's development. To understand these natural phases supports the group in its maturation process. Feedback exercises were frequently used. Feedback is one main road to open communication.

### **Why the concept of system?**

The term provides a mental model for understanding the complexity of an organisation, therefore it is useful as a model of exploration and explanation. Systems, both organizational and other, are developed and transformed through the process of discrimination and integration.

Members of a system, here a company, may work with the process in order to facilitate the fulfilment of the task and further to empathically build on each other's ideas and communication, rather than debating and competing, what *promotes discrimination and integration of differences (SCT)*. This process of discrimination and integration is a necessary and sufficient condition for *survival, development and transformation of systems (Gantt & Agazarian, 2005)*.

The health care company illustrates a successful process. In all likelihood, this is the result of the partners' dialogue and willingness to address all the needs of minor and dramatic changes within the company. Everyone works professionally and with quality towards the common goal: the company's profitability and survival.

### **The entire system in the room – sociodramatic work**

The company eventually became a hierarchical and more complex system. The new entire system

was being presented on stage. Differences became increasingly possible to accommodate mentally and emotionally. Role reversals with different stakeholders, a socio-dramatic way of working, were helpful.

Having the *entire system in the room* enables working with and mapping of different aspects of the system: everyone sees, hears and experiences everything simultaneously. For example, the shareholders might sit down and dialogue about important themes, while the employees stand up and listen. Role reversals then give totally new perspectives. Thereafter, it is important to listen to all the different subsystems and respect different viewpoints. For further integration, discussions are conducted in mixed smaller groups (with representatives from each subsystem). Having shared viewpoints and feelings openly between all, these discussions usually have a strong integrative effect. Finally, everyone jointly share experiences and lessons learned from the intervention. For closure, concluding remarks and sharing always takes place between all.

*Action Methods* offers the opportunity to work with and work through important organisational and relational topics that are often not addressed. Clear, skilled and warm leadership is a necessary condition for these processes to be embedded in the appropriate structure. When successful, openness and trust will be increased, very helpful for the efficiency and survival of the company.

## Learnings

The approach and methods described in this article has been proven to be very useful in many organisations in my consultancy – schools, mental health

institutions, government agencies and companies. It is important to apply methods suitable for an OC setting and clearly distinguish that context from the therapeutic.

When consulting to organisations, do remember that your client is the organisation; the organisational system and its roles. You do not address personal dilemmas - but role inadequacies and dilemmas. In my consultancy, I do not put words to my interpretations – they will increase my understanding of the situation and at best sharpen my interventions and use of strategy and methodology.

Rather, I will assist people not to personalise, but help them see the organisational context and its dilemmas. When successful, this approach will increase task orientation and creativity and lessen destructive tendencies to blame individuals. We focus on the organisation's history, not the persons. We concentrate on the presence and on co-creating the future. Rather than formulating the problem, we formulate the desired future together and how to arrive there.

A crucial question you should always ask: how does management and leaders fulfil their roles? You may in fact start your consultancy with this question.

*The sole purpose of structures is to initiate and facilitate desirable processes.*

*T Stockfeldt, Swedish professor and lecturer*

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