



CHAPTER FOUR

USE OF SELF IN OD CONSULTING: WHAT MATTERS IS PRESENCE

Mary Ann Rainey Tolbert and Jonno Hanafin

Use of self and presence in organization development (OD) consulting are explored in this chapter. Even though the two concepts are often used interchangeably, an important distinction is made. Presence is represented as an extension and higher-order use of self. The field of psychotherapy serves as the context for tracing the epistemological assumptions that support use of self. The aim is to create a better understanding of presence by defining it, explaining its significance, and sharing insights on how to cultivate and sustain it. In particular, the notion that presence can be calibrated is discussed using a construct known as the “Perceived Weirdness Index” (Hanafin, 1976).

Shifting the Paradigm

Sigmund Freud paved the way for much of what is done today in psychology, psychiatry, therapy, and other areas of behavioral science, on the basis of what he did or else did not do. It is known that Freud would sit behind his clients in therapy

Note: Many of the principles of Gestalt OD consulting are used in this discussion. Gestalt OD, or “OSD,” is an approach to organizational consulting developed in 1977 at the Gestalt Institute in Cleveland and represents an integration of Gestalt principles, organization development, and general systems theory. (See Nevis, 1987; Rainey and Stratford, 2001; Tolbert, 2004.)

sessions. To him, this practice ensured that he would maintain the most detached and objective stance when working with patients. He believed that, if not sufficiently controlled, the personal experience of the therapist would negatively influence the work. His thinking was consistent with positivist epistemology, which dominated the natural sciences at the time (Burrell and Morgan, 1979). The non-positivist perspective is an alternative paradigm, one that underscores the value of subjective information. This stance views the social world as relative and best understood from the vantage point of the individuals involved in a given activity. These assumptions are similar to those that guide OD.

Riding the wave of the human relations movement and sensitivity training in the 1960s, OD entered the consciousness of Western society against a backdrop of openness, love, and fairness. The goal of OD is to enhance organizational effectiveness by attending to both human and organizational needs. Organization development has always prided itself on being a values-driven profession with a unique set of assumptions about people and work.

The OD practitioner's relationship with the client can be distinguished from that of the expert or technical practitioner. Task issues are addressed less through *what* the task is (a new technology system, job redesign, restructuring) and more through *how* the task is accomplished (goals, roles, interpersonal relationships). The work involves helping organizations define and clarify values and goals, manage and solve problems, make informed decisions, and develop and effectively use human resources.

Benne (1975) emphasizes three important tenets of OD: (1) scientific inquiry, (2) the democratic process, and (3) the helping relationship. Guided by concepts, theories, and technologies of behavioral science, the OD practitioner maintains a collaborative relationship of relative equality with the client. They "labor" together, each possessing knowledge and skills that differ but are needed by the other. This suggests another important aspect of the OD client and practitioner relationship: the practitioner as an engaged and active participant.

Understanding Self

All practitioners want to do their best. They go to great lengths to enhance their skills and performance through education, using the most extensively tested theories and refined models, and investing in the most up-to-date technology. Even with these efforts, the ultimate success of an intervention rests with the practitioner and what one brings to the process. In other words, self is the most important tool of the practitioner.

Jung ([1921] 1971) called the total personality, known and unknown, the self. He would go on to structure the self in various ways. Many of the delineations are based on mythical images, which he called archetypes. Two archetypes important to a better understanding of self are *persona* and *shadow*.

Persona is the public self that Goffman (1959) speaks of as a presentation of self in everyday society. The persona is the compromise between self and society as to what one should appear to be. It is an aspect of the self that could very well belong to someone else but is often mistaken as individuality. In some ways, it is a mask that many people wear. A good example is the bell-bottomed hippie of the 1960s, who was perceived to be a unique individual. In fact, every hippie was embracing the trends, habits, and dress of every other hippie.

The persona is a necessity, because through it people connect with their world. The persona makes life pleasant, just as clean teeth make for a nice smile. Too rigid a persona means too complete a denial of the rest of the personality. The key is proper management of the persona; many people lose themselves in playing a role for those around them.

Jung called the hidden side of the self the shadow. The shadow is the private self. It represents that inferior being hidden deep inside the personality. It causes shame and is all that is undesired. Like the persona, the shadow is a collective phenomenon; everyone possesses a shadow side. According to Jung, the shadow rests outside the awareness of the individual but not within the deepest level of the unconscious. Therefore, with deliberate attention, the shadow can be accessed and assimilated into a healthy persona. The shadow is where much of an individual's personal development work is found. The more the practitioner learns about self, whether it is persona or shadow, the more effective the self as an instrument of change.

Use of Self in OD Practice

From its earliest beginnings, the OD profession maintained the practitioner's importance to the change process. The field gives legitimacy to the practitioner tapping into and acting on personal data and observations in an effort to influence the client, whether the client is an individual, a group, or an organization. Use of self creates a more powerful and compelling engagement. This stance is based on the work of Fritz Perls: "And rather than leave the therapist half-hidden in the wings in order to encourage regression and transference in the patient, the heart of the psychoanalytic method brought therapist and patient onto center stage together in order to illuminate their actual relationship as clearly as possible" (Perls, 1969, p. viii).

Edwin Nevis goes on to say:

The practitioner is not only to stand for and express certain values, attitudes, and skills, but to use these in a way to stimulate, and perhaps *evoke* from the client, action necessary for movement on its problems. This means that the practitioner is generally more open and revealing about the thoughts and feelings than might be true in other forms of process consultation. The aim is to take advantage of the issues of difference, marginality, and attraction by the client so as to use oneself in the most powerful way possible. Thus the Gestalt-oriented organization practitioner primarily focuses on *interaction with the client* as a means through which movement toward improved organizational functioning will occur. Specifically, the practitioner models a way of approaching problems and, through interest in the attractiveness of this way of being, hopes to mobilize the energy of the client [Nevis, 1987, p. 54].

Presence: The Practitioner's DNA

Taken to its zenith, use of self involves making a difference, giving and risking, and providing a force not usually seen or experienced by the client. What really matters is the practitioner's personal style. Consequently, use of self is elevated to a level referred to as presence, which requires a more holistic and deliberate engagement with the client.

There are two primary goals of OD practice: to improve the functioning of the client system by understanding and using OD concepts, theory, and methods; and to give a presence that is otherwise missing in the client system.

Presence represents the translation of personal appearance, manner, values, knowledge, reputation, and other characteristics into interest and impact. Presence is not manufactured. Everyone possesses presence, regardless of the level of awareness of the impact of that presence. Princess Diana and Dr. Martin Luther King Jr., had presence. Deepak Chopra and former U.S. President Bill Clinton also come to mind. President Clinton is known for his ability to make whomever he is talking to feel like the only person in the world at that moment. When it comes to presence, there are no duplicates, only originals. In this sense, presence can be understood as "practitioner DNA," a composite of unique qualities.

Presence is use of self with intent. It requires the practitioner to be constantly aware of self and others, and to selectively use that awareness to advance the work with the client. Over time, intent becomes second nature. By noticing internal experience and paying attention to the reaction and response of others, the practitioner is on the path to expanded presence. Exhibit 4.1 identifies principles of presence: be honorable, be an effective agent of change, and be curious.

EXHIBIT 4.1. PRINCIPLES OF PRESENCE.

Be Honorable

Align personal assumptions, values, beliefs, behavior

Stand for something; take a position

Dare to be different (or similar)

State the obvious

Speak the unspeakable

Be an Effective Agent of Change

Be an awareness expert

Facilitate enhanced interaction among members of the client system and with self

Teach basic behavioral skills

Model a methodology for solving problems and for dealing with life in general

Cultivate conditions for the client to experiment with new behavior

Help the client complete work and achieve closure on unfinished business

Be Curious

Stay in a space of perpetual wonderment

Show genuine interest in the client

Be interested in self

Explore the nature of relationships between self and client and among individuals in the client system

Presence: Past, Present, Future

Another way to look at presence is through the lens of time: past, present, and future—that is, in terms of what the individual has done, is doing, and will do. These three elements influence the public's perception of the practitioner and the level of esteem that will be extended.

Past Presence

The “past presence” consists of characteristics that contribute to credibility and authority. This includes credentials, work and life experience, whom one knows, where one has been. It is the “been there, done that” factor. Being able to point to ten other mergers and acquisitions gives the practitioner a platform on which to stand at the beginning of a new merger and acquisition opportunity. One's past experience can set the level of gravitas perceived by others. A good example is

former South African President Nelson Mandela, who generates respect and deference that are based on his life's accomplishments, history of leadership, and ability to persevere in the face of insurmountable odds. His reputation moves him to a place of high regard on the part of the public.

Present Presence

The more explicit characteristics of a person are found in "present presence." They include attire, posture, voice tone, content of conversation, gender, race and ethnicity, and physical ability. Many of these characteristics are already evident as the practitioner shows up. The practitioner who dresses casually in a conservative environment may not be regarded as highly as one who dresses in a dark suit and white shirt. It can be difficult to determine the degree to which these qualities influence how a person is perceived. Many practitioners do not know what they evoke. It is important to become self aware and interested in the impact one has on others.

Future Presence

Impact is what drives "future presence." It involves the client's interest in the practitioner and one's work beyond the present moment. Future presence is a lingering presence that often leads to follow-up engagement for the practitioner. Clients want to experience a repeat performance with the practitioner who makes a difference. Another aspect of future presence is the ability to catalyze shifts in the client system in the moment that will have an impact in the future. An example here is a practitioner influencing a client, John, to examine a deeply held belief that he must be prepared with a highly polished, electronic presentation or "deck" in his first meeting with his potential client. Future presence happens when the client begins to consider attending the meeting without a deck and simply having a conversation. The shift in the client's thinking begins during the interaction between the client and the practitioner. Additional impact could be reflected in the client's future behavior. Effective future presence suggests several questions regarding the impact of the practitioner:

- Did the practitioner spark a shift in the client's assumptions, thoughts, and behaviors?
- What did the practitioner teach?
- What new learning occurred for the client?
- Did the practitioner exceed expectations?
- Did the practitioner evoke curiosity about what he would do next?
- Did the practitioner make lasting positive impressions?

Modes of Presence: Evocative and Provocative, Being and Doing

Working with intent implies that the practitioner has an objective in mind when intervening. One objective is to influence the client in a manner that advances the work. Nevis (1987) describes two ways practitioners can be influential: by assuming either an “evocative” or a “provocative” stance.

If the goal of the intervention is to raise client awareness or interest in a particular topic or situation, the practitioner assumes the evocative mode. This usually occurs in the early stages of a new issue, problem, or engagement. Evocative mode helps the client assess the situation, understand implications, and brainstorm options about the direction that should be taken. Here, the agenda is still emerging. The evocative mode creates a climate that allows the practitioner to track the interest and energy of the client. The job of the intervener is to actively listen and elicit responses in an effort to shape and structure the client’s thoughts and feelings.

This does not mean that *self as evocateur* is a passive presence, void of challenge. The goal is to stimulate but not unnerve the client. Consider a white male practitioner who shares his feelings about the absence of multiculturalism in an all-white-male client group. Multiculturalism is a personal value of the practitioner. By speaking to the issue, the practitioner is not making a demand on anyone to do anything but is simply using his presence to give voice to data that sit in the room. Someone may be interested and moved to act as a result. The extent to which the group is influenced is information for the practitioner.

Once the direction of the work has been determined, the task is to formulate a plan of action and then move to implement it. A more assertive presence is required. Action is behind the provocative mode. The practitioner uses presence to support the client in getting things done. *Self as provocateur* is an action-driven and directed intervention style that demands a response. Saying to a CEO that his behavior is inconsistent with behavior that he publicly advocates for his firm is provocative. It is probably difficult for the CEO to resist reacting to the comment. Provocative connotes a range of impact on the client, from slight irritation to infuriation. The idea is not to incite a riot but to stir things up. The provocative practitioner lives on the edge of certainty and uncertainty, never knowing what the response or reaction might be.

Another way of looking at evocative and provocative modes is along the continuum of *being* and *doing*. As with the evocative mode, the strength of the practitioner in a being orientation is the ability to help the client examine situations, gain perspective, generate ideas, and explore implications. The practitioner holds a diffuse and open awareness that is easy and unencumbered. Understanding people and their feelings is important in the being orientation.

Conversely, a doing orientation is best supported by focused and structured awareness. The value of the doing orientation rests in implementing plans and tasks. Reaching the goal line is a key driver. Experimenting with new behavior and experience is involved. As with the provocative mode, the practitioner assumes more of a leadership role in a doing orientation. The intervener is active, risk-taking, and opportunistic.

Cultivating Presence

Even though presence is not manufactured, it can be cultivated. Seeing self as the most powerful tool the practitioner possesses calls for constant maintenance of equipment. Cultivating presence requires more than downloading the latest organizational change models, attending conferences and workshops, or perusing the current leadership bestseller. These things may be necessary, but they are insufficient. Cultivating presence requires a commitment to lifelong learning and development. Figure 4.1 identifies the six elements of cultivating presence:

1. *Continuing to work unresolved issues and unfinished business.* Therapy, personal growth experiences, and support groups are avenues to consider. Unresolved issues of power, authority, intimacy, and inclusion distort the relationship between client and practitioner.

2. *Committing time and energy to active reflection.* This helps to go beyond simply having an experience, to understanding the experience. Personal insight is the goal. No matter how similar engagements and situations may seem, each one is unique and offers learning.

3. *Actively seeking feedback from colleagues, clients, and friends.* The OD practitioner needs to understand what kind of impact one is having, including what one evokes. What one evokes in others can be the most difficult feedback to capture; yet it is critical to using one's presence.

4. *Living life fully.* This means creating a rich ground of experience of all kinds. The richer the field of life experience (family, relationships, travel, hobbies, spirituality), the more the practitioner has to draw from, and the more likely a lively part of self will emerge in the relationship with clients. Personal development is professional development.

5. *Investing in a broad worldview.* Traveling the world to explore new cultures and keeping current on world events help create a fertile context and enhance the opportunity to connect to people and issues.

6. *Experimenting with new ways of being.* The familiar can be comforting and numbing. Taking a different route home, ordering a new entrée, acting on a repressed impulse unveil fresh parts of the self, as does trying on new styles, postures, and behaviors in the interest of expanding one's range.

FIGURE 4.1. SIX ELEMENTS OF CULTIVATING PRESENCE.

Marginality and Boundary Management

By definition, presence means being different. The marginality of the practitioner is a major asset in creating presence. What is meant by marginality is maintaining a distance from the client or client system in order to keep a healthy perspective on what is happening. Distance encompasses the spiritual, emotional, cognitive, and physical.

In the initial stages of consulting, when the practitioner is entering the system, lack of knowledge about the client in some ways supports marginality. Neither practitioner nor client tends to be eager to reveal all at this point. As the relationship builds, caution gives way to comfort, and the marginality of the practitioner begins to suffer. The act of maintaining marginality is often referred to in OD as “boundary management.” It is an essential component of presence.

Boundaries are lines of demarcation that are visible and invisible. In establishing boundaries, one chooses what or who is in bounds and what or who is out of bounds. Boundaries are perceptual and are constructed through a process of

choice. Suppose, for example, a practitioner decides to begin a major change initiative with the global executive team rather than with just executives based in the United States. The decision to expand the boundary of inclusion to all executives is strategic, and intended to realize maximum impact. Boundaries can extend from rigid and closed to flexible and open. Change made to a boundary or in the bounding process always causes resistance. Furthermore, anytime a system opens its boundaries, it risks being influenced, co-opted, drained, or irreversibly changed. The practitioner must anticipate and plan to deal with these realities of change. Understanding the concept of boundary and the bounding process helps practitioners better define and guide the work.

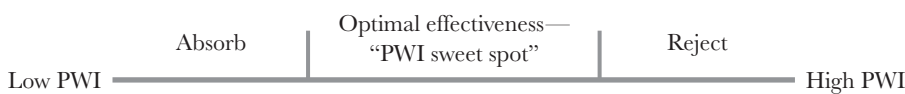
Boundaries also involve the extent to which a practitioner uses self in the work. A practitioner who is “underbounded” is apt to share more experience than is practical and is likely to be perceived as too familiar. On the other hand, the practitioner who is overbounded will be less forthcoming in talking about personal experience and thus perceived as distant. Either extreme has an impact on presence. The practitioner does not want to be too present or not present enough. There are ways for practitioners to manage and calibrate personal boundaries.

Calibrating Presence with the Perceived Weirdness Index (PWI)

Change takes place at the boundary, at the intersection of what is familiar and what is different. The OD practitioner usually chooses to position himself or herself on or outside the boundary, using interaction with the client from this position as a central part of the work. To have a practitioner maintain a presence at the boundary is unusual for most clients. However, it is the give-and-take, the negotiation of differences between the client and the practitioner that generates excitement, learning, and solutions.

Difference is also necessary for synergy, but it does not guarantee it. Difference is a prerequisite and a peril of presence; one can have too much or too little presence. The Perceived Weirdness Index (PWI) is a guide to how different (weird) one is in relation to a system (see Figure 4.2). Agents of change must model a different way of being, thinking, and behaving. Otherwise, what value do they bring? Winston Churchill said, “Show me two men who think exactly alike and I’ll show you one man I don’t need.” Churchill is an example of low PWI. At the same time, if the practitioner is too different (a high PWI), effectiveness is jeopardized. The client focuses on the practitioner’s difference rather than the work. Practitioners must manage the dilemma of furnishing a presence that is missing in the system while keeping PWI at a palatable level.

FIGURE 4.2. PERCEIVED WEIRDNESS INDEX (PWI) AND RANGE OF EFFECTIVENESS.



Managing PWI requires awareness, intent, and timing. At the beginning of a new engagement, the practitioner must be seen as similar enough to establish credibility. This comes from demonstrating familiarity with the situation, experience in working related issues, understanding the corporate terminology, and having a comfortable but relaxed demeanor. It serves the practitioner well to emphasize being on the same wavelength as the client by expressing appreciation for the client's situation. This is achieved by asking informed questions, offering examples, and affirming the client's perspectives when there is agreement.

Being too different too soon can convey lack of understanding of the client and the problem. Once a connection is made and the intervener has passed the test of admission, the opportunity for greater differentiation is there. The practitioner can reframe the situation as first presented by the client, challenge some of the client's underlying assumptions, ponder aloud how the client may be contributing to the problem, or suggest unconsidered paths and processes in addressing issues.

The underlying principle is to first create a platform of credibility in the client relationship. This is done primarily through joining and connecting with the client. From this platform, the intervener is then able to launch ways of interacting that challenge, provoke, and unsettle the system.

In terms of PWI, the degree of difference in one's presence that the client is able to tolerate is often a function of what the practitioner has accomplished. This competence-eccentricity continuum (or the Dennis Rodman principle) asserts that the better one is at what one does, the more leeway one will be allowed to be different. Because Rodman was one of the best defensive players in the National Basketball Association, his nightly hair color changes and other unconventional behavior were accepted. Most firms have quite another code of conduct (such as dress and work schedules) for their award-winning researchers than they do for the rest of their workforce. Competence breeds tolerance for the eccentric. Furthermore, the practitioner with name recognition, a proven track record, or a compelling presence is often expected to exhibit behavior that is a bit weird.

Consider the PWI Range of Effectiveness in Figure 4.2. When PWI is too low, the practitioner runs the risk of being absorbed into the system. This disappearance or lack of presence can severely limit the ability of the practitioner to get the attention and buy-in necessary to influence the client. After a practitioner has been in an organization for years, it is a great challenge to sustain a compelling presence. This is a particular struggle for internal practitioners or external practitioners who have developed an intimate relationship with the client. Some clients issue identification badges to external practitioners. Employees are sometimes surprised when they discover that these individuals are not employees.

If PWI is too high, the client is unable to extend the boundaries to include the practitioner's differences. The client system, like the human body, finds a way to isolate and expel the foreign matter. Issues of inclusion, autonomy, and standing out are activated in choosing a stance that is different. In his "Rules of Thumb for Change Agents," Herb Shepard (1985) suggests that the practitioner start where the system is.

The primary challenge for the OD practitioner is to locate and operate in the "PWI sweet spot." This means a presence that is similar enough yet sufficiently different to compel the interest of the client to test some of its assumptions, thoughts, and behaviors. The best interventions are those made at the high end of the PWI sweet spot. Searching for the sweet spot is ongoing work because it changes with the client. The objective is to influence systems and stay alive while doing so, which is Shepard's first point of advice to change agents (1985; see also Hanafin, 2004).

Skills and Abilities of Presence

Being fully present means intervening with conviction. It involves having an attractive aura, without being charismatic. Even though the practitioner does play to the audience in some ways, it is achieved with the right mix of spontaneity and intent. There are specific skills and abilities associated with presence:

- Tolerating confusion and ambiguity without rushing to organize it, allowing something to emerge naturally rather than forcing it.
- Separating data from interpretation and emphasizing nonjudgmental observations. The closer to actual data, the less distortion of the client's experience.
- Stating things succinctly, clearly, and directly.
- Seeing and being respectful of where the client is at all times; scanning for clues and asking when unsure.
- Attending, observing, and selectively sharing observations of what is seen, heard, felt, and so forth.

- Attending to one's own experience of feelings, sensations, and thoughts, and selectively sharing them.
- Being aware of one's intentions at any moment; being clear about the priorities of the work.
- Focusing on what is most interesting to the client; being aware of the emergence or lack of emergence of themes for which there is excitement; supporting joining so that something happens.
- Making good connections with others and helping others do the same; modeling clear and permeable boundaries, influencing dialogue, and letting go of being in control.
- Stating observations in a way that can be heard and considered.
- Using the client's language to heighten the capacity to be heard; using metaphors to paint a verbal picture.
- Staying in the power of the here-and-now and focusing on the ongoing process.
- Appreciating the quality of good breathing and body centering to support self and other.
- Stating observations in a way that can be heard and considered.

These skills and abilities require a personal appetite for the excitement of the unknown and confidence that one can handle what emerges. Self-awareness minimizes the OD practitioner's projections as well as fixed patterns that might get in the way of effectiveness. One's ability to care for self influences the ability to sense, create, and choose openness over defensiveness.

Summary

This chapter has explored the relationship between use of self and presence and offered suggestions for cultivating and effectively using presence to have greater impact when intervening in organizations. In the industrial age, employees were seen as little more than a pair of hands, executing assigned tasks. The postindustrial era ushered in a shift to viewing employees as complete human beings capable of participating more fully in the work process. This change in worldview was consistent with the field of OD. The one thing that is distinctive about OD is the significance it places not only on the client as individual but also on the practitioner as individual. The personal experience of the practitioner has always been regarded as a valued and valid source of data and information in the change process. Use of self is a primary consideration of the OD practitioner and even more critical when viewed through the lens of presence.

References

- Benne, K. D. (1975). Conceptual and moral foundations of laboratory method. In K. D. Benne, L. P. Bradford, J. R. Gibb, & R. O. Lippitt (Eds.), *The laboratory method of changing and learning: Theory and application* (pp. 24–55). Palo Alto, CA: Science and Behavior Books.
- Burrell, G., & Morgan, G. (1979). *Sociological paradigms and organizational analysis*. Portsmouth, NH: Heinemann.
- Goffman, E. (1959). *The presentation of self in everyday society*. Garden City, NY: Doubleday.
- Hanafin, J. (1976). PWI—Perceived weirdness index. (Educational document). Cleveland: Gestalt Institute of Cleveland.
- Hanafin, J. (2004). Rules of thumb for awareness agents. *Organization Development Practitioner*, 36(4), 24–28.
- Jung, C. G. (1971). The collected works of C. G. Jung. In J. Campbell (Ed.), *The portable Jung*. New York: Viking Press. (Original work published, 1921; original translation, 1923)
- Nevis, E. C. (1987). *Organizational consulting: A Gestalt approach*. New York: Gardner Press.
- Perls, F. S. (1969). *Ego, hunger and aggression*. New York: Vintage Books.
- Rainey, M. A., & Stratford, C. (2001). Reframing resistance to change: A Gestalt perspective. In G. Bergmann & G. Meurer (Eds.), *Best Patterns—Erfolgsmuster für Zukunftsfähiges Management* (pp. 327–336). Neuwied, Germany: Hermann Luchterhand Verlag.
- Shepard, H. A. (1985). Rules of thumb for change agents. In D. A. Kolb, I. M. Rubin, & J. S. Osland (Eds.), *The organizational behavior reader* (5th ed., pp. 682–689). Upper Saddle River, NJ: Prentice Hall.
- Tolbert, M.A.R. (2004). What is organization & systems development? All about the O, the S, and the D . . . and of course, Gestalt. *Organization Development Practitioner*, 36(4), 6–10.