

## **A Framework for Consulting to Organizational Role**

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## **A Framework for Consulting to Organizational Role**

### **Abstract**

Role is a key component in *any* organizational change and a critical place for such change to be initiated. This paper discusses the concept of organizational role and its complexities. The paper offers both a framework for thinking about organizational role and a process for consulting to organizational “role-holders.”

# A Framework for Consulting to Organizational Role

## Introduction

“Role” has been part of the organizational discourse for as long as people have been thinking about organizations in scientific terms. As practitioners who are called upon by clients to think about organizational life and the process of change that organizations continually experience, we have concluded that most organizational occurrences -- be it a change in process, strategy or structure or making sense of daily operating issues -- begin and end in the roles of individuals and in the way that these “role-holders” act and interact, consciously and unconsciously. This paper begins to look at one method of doing so -- to think about role and all it contains for the person and the organization.

This article, then, is directed to three interrelated purposes, to:

1. Help “retrieve” the concept of role from its current state of what we experience as disregarded in organizational studies and consulting practice and place it in the body of organizational reality and functioning;
2. Depict a framework for thinking about organizational role; and,
3. Describe a process for consulting to organizational role.

In the spirit of this series on consulting to organizational change, we invite the reader to apply our thinking on role beyond the concepts as presented here, to the broader issue of the impact any change might have on role. After all, it is ultimately the *role* (as much as the person in it) within an organization that change efforts should be directed towards and the *role* which will experience the greatest impact.

## Role

We have found much confusion in organizations when it comes to the use and meaning of the word “role.” Role has ranged in definition from the “acting” one does in “role,” as if to “play a role” and not be real or true to the self, to the description of what one does on paper (not necessarily in reality). In our experience, though, role is more complex and a necessary organizational component. It is defined in the dictionary as:

1. A character or part played by an actor in a dramatic performance.
2. The characteristic and expected social behavior of an individual.
3. A function or position. (The American Heritage Dictionary, 1976)

In organizations, role could actually be defined as all of the above. One does “act” the part they are expected to play or the role as “given.” Someone within an organization needs to be in the role of director and producer to authorize the part, define their expectations for the part, describe the way in which they want the part to be played, pay for the part, and so on, *giving* the context and “organizational meaning” to the role being undertaken. One can also assume a role in a rather convincing way without truly *being* in role. Acting is also an appropriate definition in that we often find it difficult to assume an organizational role because of the difficulty of negotiating between our feelings about our work role and what we are expected to achieve or produce -- regardless of our competencies and skills.

Organizational role, though, is not just about *performing* in role. The second definition also applies as we consider how one “takes” their organizational role. Organizations and their parts have certain cultures. These groups and subgroups have stated and unstated behaviors that are considered appropriate and others that are not. One’s assumption of an organizational role needs to consider these behavioral aspects in order to fit in, get the work accomplished, manage day-to-day activities and operate professionally and personally in an effective manner. One’s behavior and personal style does not have to match or mirror the organization’s but the two need to coexist; the differences and similarities must be understood and negotiated. The way in which a person in role *takes* these dynamic parts and incorporates them into their role is critical to that person’s performance, effectiveness, health, relatedness, and so on.

The third definition above states what we are most familiar with -- a role as “a function or position” that has a set of parameters within which it must complete some set of *tasks*. This configuration, however, is usually not adequately defined in a job description. The subtleties and dependencies of each *task* make the reality of working within a function or position more complicated. One’s ability to function or be in a position is complicated by the pressures within an organizational system; by the ongoing negotiation between what one is *given* and what one *takes* for the role within which they are to be working.

The framework emerging from the above, role as taken and given and representing part of a system-of-tasks, does not yet fully address all that occurs in and with role. Role is very much defined and shaped by the individual in it and what the individual brings with her/him. While the organization’s definition of a role may be identical for two people, the way in which they work and their effectiveness and success may vary. Two people who find themselves in the same organizational role can achieve very different levels of effectiveness and success due to the impact of their “individual-ness” in what has been given to them and how they take-up and work in this role. This is especially true in the context of any change that these individuals may face in their work role. One person might thrive in the exciting, albeit unsettling, position of managing a change effort while another might make limited progress. Another manager may find the

change opportunity as invigorating while yet another might become stressed and, perhaps, “burned-out” from the experience. There are also components of role, such as feelings, pressures and experiences, which are a product of the organization and not the individual. These aspects of role that are brought to the role by the individual in it and “put into” the role by the organization is what we think of as the *sentient* system and are never found in a job description

Role, then, can be thought of as the way in which one works-in-role, including an individual’s:

1. Specific assigned duty, activity, purpose and/or function that is required for the pursuit of some common effort in a group, team and/or organizational effort (*given* and/or *taken*).
2. Part, piece or share in the overall mission and system-of-*tasks* present in an organization.
3. Unconscious, assigned and/or assumed function in the covert system of irrationalities or *sentience* attendant to the organization’s overall mission and system of tasks.
4. The way in which an individual understands and then works with their role as given and taken within the organization’s systems of task and sentience.

In helping others think about their organizational role, we must help them consider the part the organization expects them to play, the organizational culture(s) that shape behavior, the various relationships and interactions with others within the organization, and the actual function that is “needed” in the system. In addition, we must help role-holders to think about how and what they are contributing to the role’s definition and performance.

## Organizational Role

### Where the Individual and System Meet

The concept of role contributes powerfully to the intellectual machinery available for understanding organizational life and appreciating the complex experience of endeavoring to contribute to productive enterprises. Appreciating the concept of role enables us to see where the person and system meet. From this vantage point we can think about the person in context, and the interrelations between the two. It renders the impact of the organization on the individual visible, in terms of the experience of fulfilling a particular part, and it renders the impact of the individual on the larger organization visible in terms of how individuals “take up” their roles and, in turn, enact the set of systemic forces that are expressed through the role. Since the concept of role creates a window into organizational life where the individual and the system meet, role allows us to think carefully about how the individual, at both conscious and unconscious levels, inter-links with the system and the demands and expectations for performance it imposes on its members. The formal role delegated to an individual carries with it authority to work on certain tasks in certain ways, although there may be a discrepancy between the stated authority and what authority, in fact, accompanies a delegation. Symbolic meanings, informal tasks, covertly authorized work, and so on, are also attached to roles and, in turn, affect the texture of collaboration, competence and meaningful contribution.

By broadening role to include all of its constituent elements, we can begin to appreciate the complexity of the concept and the range of forces impinging on people at work. Take, for example, how frequently Human Resource departments are criticized for the quality of the candidates they find and hire for the other departments in the organization. Usually, though, Human Resource departments are *covertly authorized* to prevent lawsuits and subsequently act on that basis, which leads to the outcome for which they are criticized. How does the Vice

President of Human Resources come to understand and respond to this dilemma? What data exists to discern both the stated purposes of human resource activities and the covert definition and meanings attached to them?

This brief example says nothing about the other side of the equation -- the subjective side of the individual's own experience of the multiple expectations and attributions **given** to a role. How the individual in the role makes sense of these formal and informal, spoken and unspoken, components of the role produces another set of elements that altogether comprise this complex constellation of factors that we refer to as "role."

The experience of role provides the data to make sense of the larger surrounding context and it shapes the ways in which others approach and understand us. It also provides the explicit and tacit guideposts that assist us in our efforts to make meaningful contribution to the organization's system of tasks.

### **A Discarded Concept**

Even though role is a basic building block of organizations, the concept has faded in popularity, and has become largely discarded in contemporary, emergent approaches to thinking about and intervening in organizational life. Here we offer some thoughts and hypotheses about why the concept has become marginalized and little used in mainstream organizational thinking. In particular, we identify two related factors that have contributed to the fate of this concept:

1. *"Role" has been associated with bureaucracy and can connote something fixed and static.*

In recent years the term "bureaucracy" has been used as an organizational dirty word, often signifying a calcified, rigid, unresponsive and deadening approach to structuring organizations that is failing in today's post-industrial world of complexity and change. The legacy of Weber and industrial era organizations has left many with a view of bureaucracy as a fixed web of positions, organized rationally in hierarchical fashion and comprised of roles that are filled impersonally by their occupants.

Today, however, we see other kinds of organizations emerging replacing those that look like the archetypal pyramid. Instead of structures that create fixed, invariant positions, structures are dramatically changing and becoming more flexible. Correspondingly, the positions held by individuals within these structures are subject to fluctuating pressures, ongoing adaptation to emergent conditions and likely to be comprised of changing "bundles" of tasks. The increasing predominance of knowledge-based work and the emphasis on local problem solving and initiative favors passionate connections to work, personal investment and creativity instead of Weber's (1946) impersonal policy-governed bureaucrat.

Not only has the concept of "role" been stigmatized by its association with bureaucracy but its association with a fixed position has raised doubts about the relevance of the concept in this post-modern world of turbulence and active adaptation. With the experience of chronic instability, rapid environmental change and the emphasis on flexibility, nimbleness and competitiveness, more attention has been directed toward process variables, such as workflow, quality management and concurrency. However, we argue that the association of role with a fixed position is an error. *A systemic view of role leads to a comfortable coexistence of the idea of role with continually evolving and adapting organizational settings.*

Another concept that has shared a similar fate, which is worth noting here, is that of "boundary," a concept that provides a powerful focus on systemic transactions across

relevant subdivisions. But, as with role, people often and erroneously associate boundary with fixed structures and rigid distinctions. The concept was quickly discredited, stigmatized as “bureaucratic” and “command and control/authoritarian” and has been further devalued as promoters of new forms of work practice latched onto the idea of “The Boundaryless Organization” ( Ashkenas, Ulrich, Jick and Kerr, 1995) and other similar formulations that jettisoned -- rather than adapted -- the concept. This turn of events depleted the repertoire of useful concepts available to understand and intervene in organizational processes, since “boundary” is perhaps the most powerful conceptual tool at our disposal for discerning the impact of differences in role relatedness, i.e., authority, tasks and subsystem relations (see Hirschhorn and Gilmore, 1992, for an excellent overview of the persistent importance of recognizing and addressing issues of boundary in contemporary organizations). In the same vein, consigning “role” to the scrap heap of outmoded bureaucracy tainted concepts depletes our ability to look at the complex interconnections between the person in the context of organizational life.

2. *The concept of role became hopelessly confused and loaded down with multiple meanings and connotations that, like all such ideas, it no longer helped nor clarified.*

Often, the most compelling and illuminating concepts become so overly used and laden with nuance, connotation and multiple meanings that they become, essentially, useless.<sup>1</sup> The idea of “paradigm,” for example, or that of “system” come to mind. As with social science in general, organizational studies follow a similar pattern with powerful emergent ideas, exacerbated by the commercial “fad-ing” of the latest and greatest idea. It seems that we repeatedly see interesting and useful ideas arise, spawn new quasi-religions and then sink under the weight of confused use and generalized application; “re-engineering” and “learning” are two recent examples of a long line of ideas that have lost their meaning by coming to mean everything.

While “role” came and went before the commercialization of organizational concepts, a brief review of the history of the concept of “role” readily illustrates the enormous range of meaning that came to be associated with the word. A cursory review of the mainstream organizational and sociological literature devoted to questions of role, reveal three major uses, role defined:

1. Structurally as the duties, tasks, responsibilities and expectations associated with a particular position;
2. As the behaviors of individual members in response to the duties, tasks, responsibilities and expectations associated with a particular position (“playing a role”); and
3. As an individual’s internal conception or image of the part that he or she assumes in the enterprise.

The legacy of Weber and the rationalistic biases of organizational thinking that have since prevailed have emphasized the essential uniformity and coherence of these three orientations. Since organizations relate means to ends rationally and since people

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<sup>1</sup> One might even argue, following Bion’s insights in *Container and Contained*, that a deeply held and anxiety-laden need to render powerful concepts powerless to challenge or disturb our habitual patterns of thought and feelings exists within an established order of understanding and belief.

impersonally fulfill their role-determined duties and obligations, the person and the role fit seamlessly together in Weber's ideal organization.

We are reminded, though, that organizational life is not so simple. In fact, a basic misfit exists between organizations and the people within them (e.g., Argyris, 1957). Plus, there are powerful forces shaping behavior in organizations that have little to do with rational task and purpose but arise from the irrational sources of meaning that exist in group norms (Merton, 1959; Newcomb, 1950), culture (Linton, 1945; Ott, 1989) and psychodynamic underpinnings of people's connection to their organizations (Bion, 1967; Menzies, 1961).

Collective life in organizations, as with collective life anywhere, is saturated by powerful emotional forces. Roles have conscious as well as unconscious components, they have informal as well as formal features, they have symbolic meaning that shapes the attributions and projections through which others decode the meaning of an individual's behavior. There are always a range of discrepancies between official roles, the roles individuals are called upon to play and the roles people actively assume. We know that the role one "plays" exerts a powerful affect on one's sense of self and that people "take up" and perform the tasks and duties associated with their roles in different ways, with, often, vastly different consequences.

In our view, role became such a rich repository for important dimensions of work experience in organizations, taking on so many meanings in so many contexts, that it, like many other illuminating concepts, suffered from the accompanying diffuseness, lack of clarity and diminished usefulness.

### **An Illustration**

Contrary to the idea that the increase in organizational fluctuation and change has rendered the idea of role *less* relevant, the rapid shifts of organizational life make the idea of role *far more* important to one's ability to make sense of the surrounding environment. The very idea of role helps us determine best courses of action and understand the range of possibilities afforded at any given time.

Take, for example, a relatively typical manufacturing plant that has undergone a major reorganization along socio-technical system principles. With the introduction of a team-based organization and the investment of teams with considerable decision-making authority, the former roles of engineers and machine operators underwent profound change. Whereas before, the engineers would direct operators to take certain actions, they now were expected to engage in a collaborative, problem-solving interaction with teams of operators. Establishing clear team boundaries required looking carefully at task requirements and establishing role definitions that allowed for effective decision-making and integration of the production process. Furthermore, the inherent tensions between the engineers and operators required a structure that could contain and help mediate the inevitable differences between the two groups -- a requirement that, in turn, pressured the plant manager's role to change significantly.

This change required careful attention to the issue of role and its many facets: what was expected of engineers and operators; what covert expectations were being placed on engineers to produce outcomes that implied the kind of formal authority they formerly held; to what extent was the operator role invested with an unrealistic expectation to resolve issues that depended on involvement of people outside of the team; and so on.

The previous illustration highlights some of the many dilemmas that organizational change presents and how the idea of role can help sort and manage them, including:

- ▲ Developing an appreciation and deeper understanding of the *new* roles;
- ▲ Examining gaps between organizational design and how people in various positions are actually being *used*;
- ▲ Discerning crosscurrents between the formal and informal definitions of roles; and
- ▲ Being able to distinguish the mismatch between the expected performance and the fantasized meaning of a role.

All of these are dependent upon one's ability to think about role as more than a simple bundle of tasks but as a concept that is a part of and includes the broader range of functions (formal, informal, conscious, unconscious, etc.) being fulfilled for the larger system at any given time.

## A Systemic Framework for Organizational Role

Working with the idea of role in helping people in organizations make sense of their experience requires a working definition of role as a starting point, especially since the term has become so laden with multiple meanings. As we stated earlier, we see role as a particular functioning of the overall system-of-tasks that is assigned to, or given, and taken up by the individual which are colored by the sentient system. From this perspective, role incorporates all of the various meanings and connotations that have collected around the term and integrates them in a dynamic, process-oriented framework. Understanding one's role, then, requires unpacking the various dimensions that comprise one's role at any given moment and learning how to identify its features.

A framework for understanding the complexity that is both inherent and experienced in role is built around two critical distinctions. The first can be understood as the mechanisms for how work is authorized and assumed in organizations and the second as the way in which work-tasks are derived and enacted. We have organized these as:

1. Whether an aspect of role is "given" by the organization or "taken" by the individual; and
2. Whether the dimension under consideration pertains to the "task" and/or "sentient" system of the organization.

How these role dimensions align with one another and intersect helps us make sense of the many patterns that emerge from the idea of role. This framework for thinking about role is critical when consulting to role, developing and designing a role, enacting a role, managing others in role, making sense of one's experience in role and intervening to effect change at an organizational level.

### Role as "Taken" and Role as "Given"

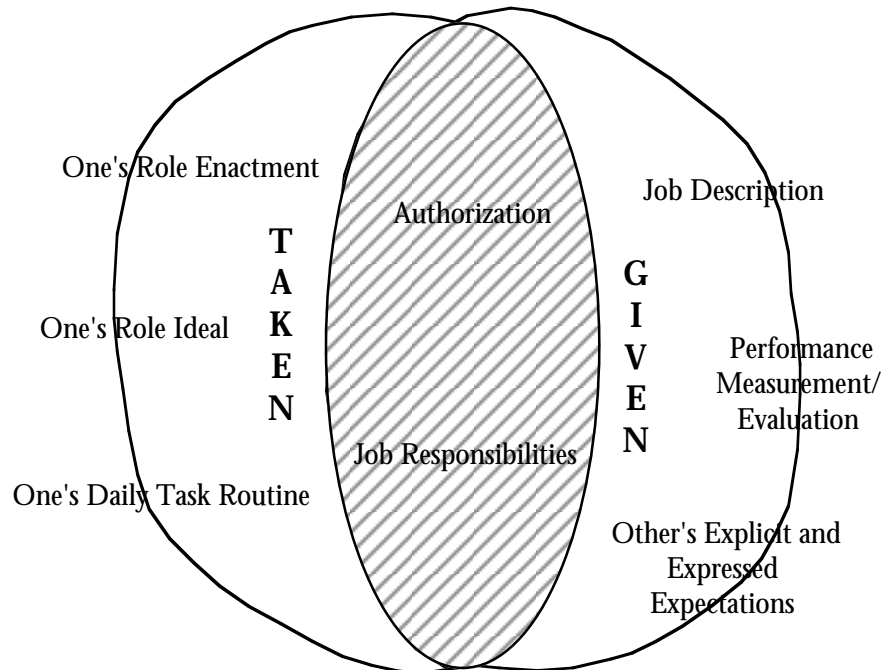
This framework begins to take shape at and between the two ways in which a role is authorized and experienced in any organizational setting -- role as "taken" and role as "given." The "role-holder's" internalized and then enacted view/construction of her/his role, how it is construed and interpreted subjectively, is the individual's role as **taken**. The role as defined by the "role-influencers," those the role-holder is working for and/or with, is the individual's role as **given**. The given and taken aspects of role produce its authorization, whether it is through the formal process of an organization assigning and thus holding an individual responsible for specific

outcomes or the “self-authorizing” mechanisms of how one takes up their responsibilities and gets the work done. It is at this boundary, between the organization’s view of role and the internally derived enactment, where considerable role dilemmas occur.

Consider the routine practice of hiring a new employee and the way in which a human resource professional and the hiring manager might interact. The human resource professional’s given role might include the enforcement of AA/EEO regulations, the hiring and development of employees with required skills or the fit of a new hire within a company’s compensation and benefit policies. The way in which this person takes up her/his set of tasks could vary, depending on the individual, their relationship to the hiring manager, the organization, the context, and so on. A “hands-on” role interpretation might have the human resource professional intimately involved in the recruiting and hiring process, possibly limiting a manager’s ability to hire specific candidates. The human resource professional’s taken role, in this case, might easily conflict with the hiring manager’s taken role. If, however, the human resource professional’s taken view of role is to be less involved or offer a broader interpretation to the given set of hiring tasks, the responsibility for compliance might shift to the hiring manager and thus appear to give the manager more flexibility (and responsibility). Each person’s understanding of both the taken and given aspects of their role and then the negotiation (alignment) between them would be necessary for both a productive hire and for the reduction or elimination of role conflict.

In our experience, organizations rarely consider alignment between the taken and given aspects of role and the way in which these impact role functioning and cause role dilemmas and organizational issues. Most likely, when managers are faced with these issues, they assume that someone is resisting work, has some lack of skill or competency, has another “agenda,” or that a behavioral or attitudinal problem is the cause.

The following diagram expresses the relationship between the role as taken and as given:



In the above diagram, the shaded area represents the degree to which the organization's expectation, the role as given, is in alignment with the individual's construction of the same role, the role as taken. The degree to which alignment overlaps is the degree to which the role is enacted as the organization expects. It is important to note that one might also be taking-up their role due to some underlying dynamic within the system that remains unconscious, unstated and, essentially, unknown to both role-holders and role-influencers. One's taken role, then, could be a result of an unexpressed and/or undefined systemic need. These aspects of role overlay and, thus, complicate the manner in which one engages in both the taken and given aspects of role.

### Task and Sentient System Aspects of Role

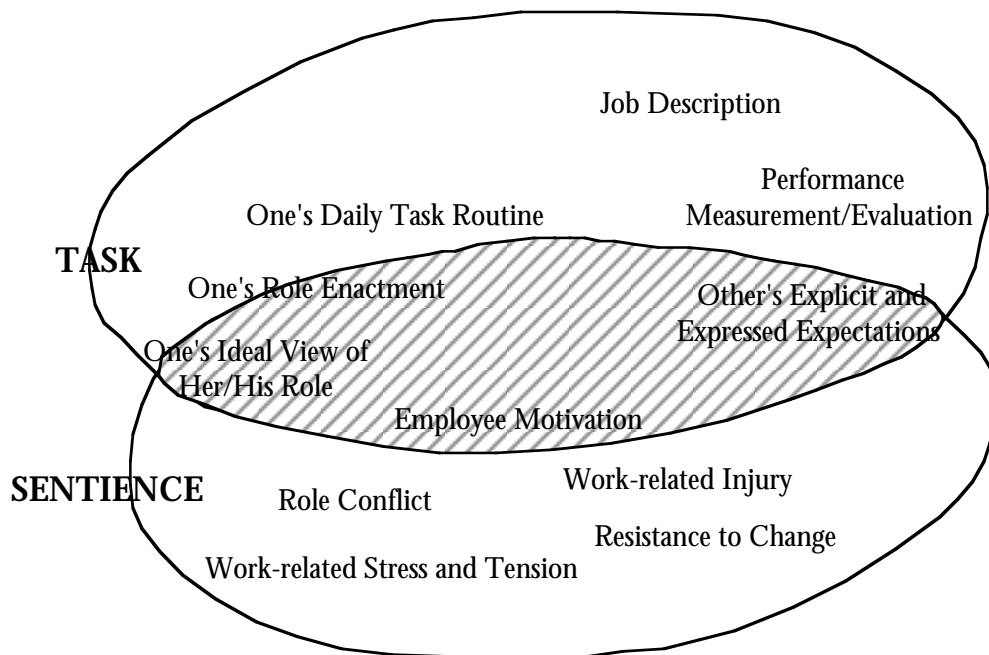
As mentioned in the beginning of this section, we believe that in addition to the way in which work-roles are taken and given within an organization, the way in which work is derived and motivated -- the expression of the "task and sentient systems" (Miller and Rice, 1967) within which role operates -- is an important factor. The distinction between task and sentient aspects of role are linked to one's responsibility (as taken and given) and authorization (given) and is a critical area within organizations where we find considerable lack of clarity yet a need for greater acknowledgement and understanding.

The **task** system are those aspects of role that belong to the structures, procedures and technologies that exist independently of individuals within organizations; "a system in which conclusions are constantly tested in a scientific spirit, seeks knowledge and learns from experience, and constantly questions how to best achieve a goal." (Rioch, 1970, 1975) The system-of-tasks one consciously assumes with the knowledge and authorization of either the self and/or others is the more easily recognizable part of role where other's conscious expectations are built and organizational rituals of performance measurement occur (the role as given), and where the individual overtly works the role as taken (this may also be the role for

which the organization recognizes an individual as “responsible”). The extent to which one is authorized in these tasks emerges in the formal space between taken and given.

The **sentient** system is the social, human process within an organization; the symbols, meanings, unconscious group forces and/or emotional significance experienced in any organization; the attitudes and beliefs based on the needs, fantasies and patterns of identification within a role and an organization. (Miller and Rice) The sentient part of role arises from the hopes and fears that govern the individual’s expectations of how she/he will be treated by others, and the beliefs and attitudes on which she/he bases her/his code of conduct from one’s history of relationships with others, including how others respond to her/his group identification, such as gender, ethnicity, education, professional identity, etc. (Adapted from Alderfer by Walker, 1992) This could also include that which one assumes by chance, necessity, as an outcome, and so on, where formal responsibility has not been established or where the responsibility may lie elsewhere yet the role-holder assumes it. The seemingly arbitrary and sometimes disruptive dynamics of the sentient system is where unproductive aspects of organizational politics and dynamics occur. It is also a place where a great deal of learning can be gained about the effectiveness of an organization’s structure, the efficiency of its processes and the capacity of any individual and group (team) involved.

The following diagram depicts task and sentient systems:



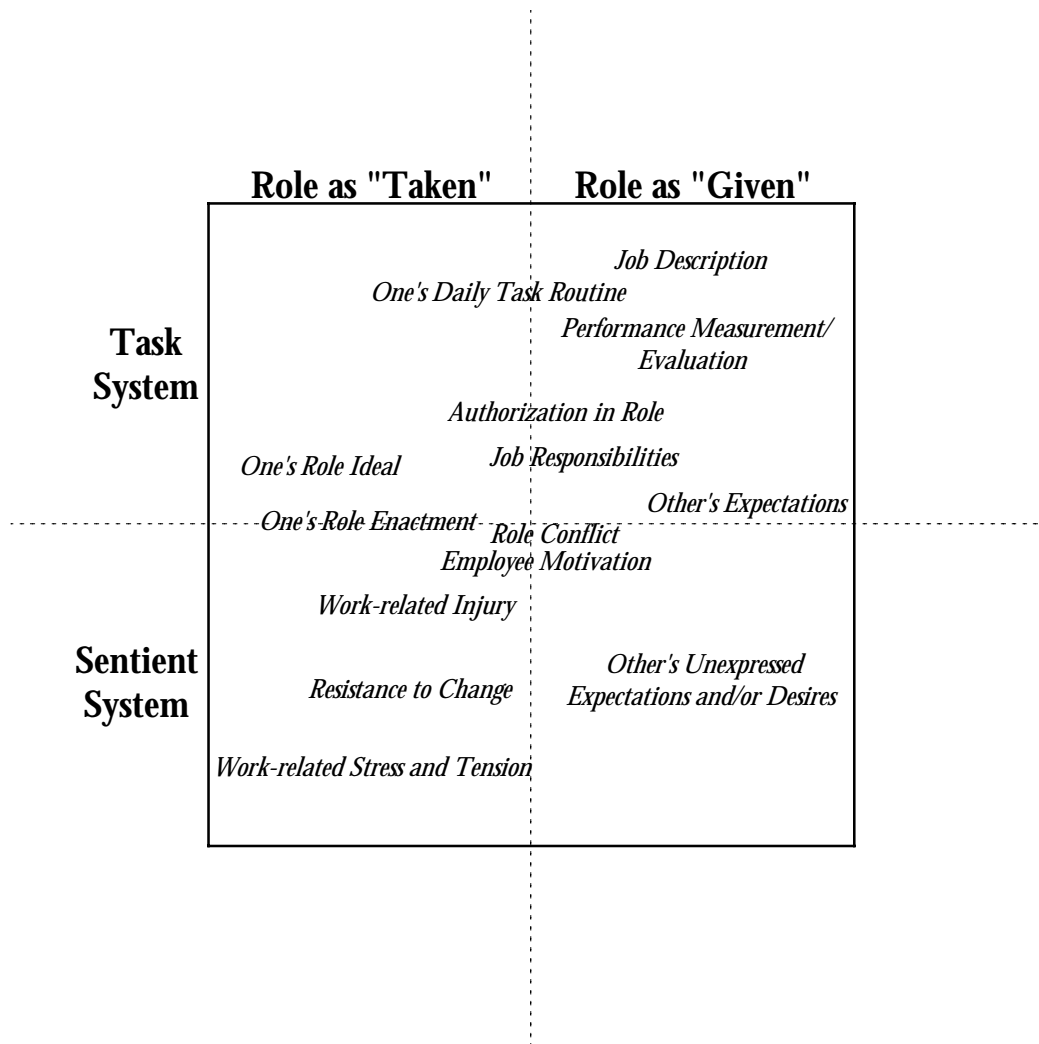
The shaded area is where the boundary between the formal and informal expressions of work within an organization take place. It is here that organizational development can be noted, including the dynamic process of teams, organizational change management, resistance to change and other systemic views of how work tasks are negotiated with the organization’s unconscious and less visible parts.

In the example of the manufacturing plant in which the engineer and operator roles were significantly shifting, the sentient system operating within this organization could easily overwhelm and disrupt the plant’s output. Let’s take, for example, a particular engineer who

enters a team of operators and begins telling them what to do; "instructing" them in their set of tasks as he might have under her prior role definition. Some of the operators react with anger, perhaps disrupting the flow of work. A split occurs in the team in which some operators resist participating and are labeled as unable to change or even reprimanded for "poor behavior." This sub-group of operators have a different experience (neither confirmed or denied) -- their behavior is directly related to the experience of their authority being curtailed. The given and taken aspects of role *as experienced* is significantly different from their expectation. One can easily imagine this resulting in increased lateness, illness or even accidents. The engineer in this case, might be doing exactly what she believed to be her role, whether a product of her construct, her resistance to changing, the expectation of her boss, etc. The difference between the operators understanding and expectation of their new role and that of the engineer has caused dramatic operating issues.

It is our experience that one's productivity in role is linked to how well a role's system-of-tasks are understood across both the given and taken realms and the ability of the organization to express and understand its underlying sentient system.

The resulting framework for understanding organizational role is expressed as follows:



One can begin to locate different role occurrences in different areas of this framework. For instance, one's authorization is both part of the role as given by the organization (as in the ability to approve large expenditures, hire and fire) and partially contained in how one self authorizes. The above factors are not meant to be fixed in their position but are placed in relative position as example. A conflict between two role-holders can be about the sentient system in that they may be fighting the fight of unresolved issues between two departments or participating in the end-product of envy and competition. Role conflict, though, can also be the result of a lack of clarity about the given tasks or represent the differences in the two individual's perception of their role.

This framework provides for an understanding of role that most role-holders seldom consider. It forms the foundation for the method we are developing for consulting to organizational role in which we work to first clarify and then align these internally and externally derived aspects of role.

## **Application -- Organizational Role Consultation**

We will briefly describe an intervention technology, Organizational Role Consultation, which is centered on the concept of role and provides managers (and other role-holders) both a window into the many facets of role as well as a way to think about how they can take up their roles, and exercise the authority vested in them, in a more productive manner. Key to this intervention methodology is how, in consulting to the organizational role-holder, we help individuals distinguish between their person as "self" and their person "in role" and to help these individuals see and work with all that is contained in each and at their many intersections (boundaries).

Achieving an understanding of role is ever more elusive considering today's complicated and dynamic conditions which eliminate the familiar guideposts, indicators and repetitive patterns of experience that were once present when organizational life was more stable. The assumption used in Organizational Role Consultation (ORC) is that the one's contribution and effectiveness in an organization can only be understood as a function of how well the individual and the organization negotiate the boundary between the role as given, which constitutes the organization's expectations, and the role as taken, how one's role is taken up and internally held. This negotiation or *alignment* is further complicated by the task and sentient systems operating within the organization. ORC is the active process of aligning the role as taken and the role as given within both the organization's task and sentient systems.

ORC is built upon this role framework in order to "unpack" and identify these dimensions of role; a process for examining and interpreting experience to provide a deeper and more textured understanding of one's role in relation to one's experience and the ongoing events within an organization.

### **The Organizational Need for Consulting to Role**

Negotiating the implications of the framework presented earlier is a struggle for individuals as they attempt to manage effectively and overcome the day-to-day dilemmas they may face. Any change within an organization (new product, service or work-process, merger, acquisition, and so on) or an organizational role (promotion, increased responsibilities, new team, etc.) create new challenges and developmental opportunities, as well as an inevitable stress or anxiety.

In the absence of any formal process by which to discuss or work on one's role, resources are used ineffectively, energy is wasted and objectives are often not met. In addition, conflicts remain unaddressed or not understood and the learning from such events remains unexplored. Individuals and organizations are usually not motivated to delve into areas of tension and thus often ignore valuable data about their work processes and ultimate goals.

The reasons one is often unable to effectively assume her/his role can be numerous and are often attributed to one or two specific issues, including:

- ▲ No clear mandate or direction;
- ▲ Difficulties in the role's configuration;
- ▲ Insufficient functional links to complementary roles;
- ▲ Multiple roles (perhaps conflicting) contained in a "single" role;
- ▲ Changing demands on both the formal and informal aspects of the role;
- ▲ Further competency and/or skill development for the incumbent;
- ▲ Organizational and/or environmental issues which "spill over" into the role; and
- ▲ Personal dilemmas, behaviors and/or style which makes functioning in role difficult.

It is our belief that all of these common attributions are continually present and not discretely responsible for role difficulties and/or the achievement of peak performance. These kinds of dilemmas are difficult to sort and solve under the best conditions, with or without external assistance. ORC focuses on these issues as presenting problems in order to unearth the complexities and the internal place(s) from which an individual's work-role is consciously and/or unconsciously derived and enacted.

### **Organizational Role Consultation**

Role consultation is the work of helping the client see her/his role from the framework we have outlined and then helping them to reconcile its meaning, both individually and organizationally. It is a process by which the consultant and client work to scrutinize and attune one's behavior in and understanding of role, including its conscious and unconscious determinants, to enhance one's personal effectiveness in relation to the needs and desires of the organization.

Over the past several years, we have been developing a consultation process steeped in the traditions of group relations, originated at the Tavistock Institute for Human Relations in London, open systems theory and psychoanalysis (particularly the object relations and interpersonal schools) in which we consult to an individual's *role* within an organization. The intention is not so much to coach the individual *through* development and the resolution of personal and organizational dilemmas but to work with the individual *in* role on how that role is related to the organizational system in order to understand both the realm of the individual's role and the context -- the organizational system within which the role is embedded and expected to function.

Within a role consultation, a dyadic relationship between the consultant and client is formed in which reflection and analysis of the framework presented earlier are undertaken. It is a process of experiential co-learning and co-evolution in the context of a risk-diminished work relationship which is developed over time between the client and consultant. The reflection and analysis task boundary of ORC includes the development issues of both the role occupant as well as the system.

### **The Benefits of Organizational Role Consultation**

The benefits of ORC are simultaneously personal and organizational in that this method of consultation strives to examine the intersection of personal and work-related experience and how the intersection of the two become productive.

The ORC process that is formed in the system of the consultant and client facilitates a sophisticated assessment of role dilemmas, including how individual issues and those in the larger organizational system (taken and given within the context of the task and sentient systems) may contribute to difficulties in role. This process results in:

- ▲ More creative and effective strategies, behaviors and ways of thinking about role, including an “internalized view” of one’s role and a more strategic orientation to anticipate future challenges.
- ▲ Opportunities for individuals to explore and clarify work roles and develop a clearer understanding of their strengths and limitations, performance issues and areas for development which leads to an increased flexibility in assessing situations and judging one’s own responses.
- ▲ Greater clarity regarding how the individual’s role situation is influenced by her/his management style and the manner in which he or she exercises authority and leadership, and a greater confidence in one’s own ability to manage and lead in the current and anticipated contexts of their enterprise.
- ▲ Behavior and performance which may be new, unfamiliar or untested territory and an enhanced ability to use the full range of one’s experience, emotional and intellectual, as a resource for understanding and monitoring one’s own and others behavior in role.
- ▲ An understanding of the individual’s contribution to and participation in any sentient system that may be present and serve the organization’s overall mission and system of tasks.
- ▲ A system-wide understanding of role from the reflection/analysis process used in the consultation.
- ▲ A greater readiness to reflect on and analyze experience as a basis for generating new ideas about the functioning of their organization and to test the data of their experience in one’s decisions, actions and inter-actions with others.

As is apparent from this discussion, ORC is not done in a vacuum. The consultant must work to simultaneously hold both the system-as-a-whole as well as the client’s picture of the system in mind in order to ask the questions that need to be asked about the individual’s role relatedness between and among the parts of the organizational system (especially those questions that the client won’t think of or might defend against). Often, these two constructs are not the same. The struggle to align these parts is very much at the heart of ORC, as is the struggle to align, productively, the many dimensions of and pressures on role.

### **How Role Consultation Works**

Organizational role consultation involves a series of meetings between a consultant and an individual. The method is an open agenda, determined by the client and starting from issues, incidents, dilemmas and concerns uppermost on her/his mind at the time. Everything the client offers, however personal or anecdotal, is treated as relevant to the work. The content of the ORC work is contracted for in this pair who work together to outline their commonly understood expectations and desired outcomes. It is voluntary and held confidentially in this pair to provide a risk-diminished space for individuals to think and reflect. Consultants may be hired by the organization but do not have a stake in the outcome of the role consultation and are not engaged in fulfilling some organizational imperative. In this deployment, consultants work with and provide feedback to the individual and *do not* report back to management unless asked to do so by the individual.

Organizational role consultations vary in length, depending on the need, and, have no hard and fast rules about ending. Opportunities to review the consultation’s usefulness need to be planned on a regular basis. It is, however, implicit in this method of consultancy that the client

will increasingly assume the work of reflection and analysis herself/himself. Part of the consultation process includes, of course, educating the client on the complexities of role outlined earlier.

None of the individual parts of the framework presented here in isolation can be assumed to be the real definition of an organizational role. It is the awareness of these, their inter-relationships, their impact and, most importantly, their alignment that helps an individual reach, understand and effectively work within role. The ORC process has evolved as a means of facilitating an individual's ability to function productively, creatively, competently and effectively -- a process to help an individual form an understanding of her/his "true-self-in-role."

## Conclusion

Negotiating one's organizational role, particularly during a change of strategy, structure or operating process, is critical to the effectiveness of the change and to the individual expected to carry out a particular role within it -- one's role is subject to continuous modification and/or transformation as circumstances within an organization change. It is difficult enough to have to work the many issues that are known, let alone all those that are a part of the many other processes operating within an organizational system.

We are reminded of the case of a president of an international division spanning Australia, Asia, Africa, the Middle East and Latin America who originally approached us to help him deal with the issues of never having enough time with his regional vice presidents and not being able to satisfactorily bring these individuals together in a "team." Though this story is long and complicated, spanning over four years, the result exemplifies the difficulties of *knowing* the right outcome, especially considering the various complexities of organizational life. This consultation began with helping executives learn about their units and themselves (through ORC) resulting in improved productivity during a period of expansive growth (this unit nearly quadrupled their income over the life-cycle of this consultation to about \$2 billion). The consultation entailed such issues as organizational alignment, staff to line responsibilities, the maturing of relatively new disparate country and regional units helping executives in role, and so on. After a couple of years, the President began to "internalize" the worry of his executive's work-life and development. He concluded that he might be in the way of further progress (stylistically, symbolically, technically, etc.) and decided to retire. He and his team formed a new international unit focussed on an emerging world region and took the rest of the prior organization, which now represented maturer markets, and moved them into other, well-established parts of the firm.

If you had said to any member of this team or the president himself less than one year ago that this was coming, they would have thought you crazy and might have even questioned your ability to work (it is interesting to note that many of these issues were identified early in the consultancy in a working note to the client but were rejected). Understanding the pressures of markets and competition are the venue of the professional business person but understanding the intricacies of what motivates them to function in the way that they do on a day-to-day basis is not usually their purview. Role, as we have outlined, is a complicated component of organizational life, that contains many available yet unknown factors. Working to help individuals sort these factors, separating from this morass what is relevant to the responsibilities they have been given and then helping them further note what they are bringing to this system of tasks is complicated; a complexity exacerbated by the sentient nature of all these separate, collected and interrelated acts.

We believe that the emerging framework and method for thinking about and consulting to organizational role presented here is critical to the process of evolving organizations to learn, improve and effect change as necessary. Organizational role consultation is a means of making the unknown known, of surfacing the change that has yet to be discovered and of grounding people to their role, each other, and their organization.

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