

Challenging Organisations and Society

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Elaborating the Theory – Practice Space: Professional Competence in Science, Therapy, Consulting and Education

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Ruth Lerchster and Gary Wagenheim

Hunting elephants in the room: How bringing theory to practice helps clients address obvious but unaddressed issues

Abstract

Bringing theory to practice as advocated by Kurt Lewin is considered a worthy, yet elusive, goal for organizational development consultants helping clients. Use of valid theory guides and informs practice resulting in better solutions to problems. We present the case of successful business ownership transfers to illustrate how theory can be useful and beneficial to practice. We describe how a theory to practice transdisciplinary intervention process helps clients better manage obvious but unaddressed emotional issues that conspire to sabotage family business transfers.

Keywords: Theory-practice; assumptions; transdisciplinary intervention research, knowledgeable action; defensive routines; reflection; organizational development

1. Introduction

This article is intended to demonstrate the extent to which offering theory to practice using a transdisciplinary intervention methodology¹ can facilitate a better decision-making process and better actions for individuals within their social systems. Transdisciplinary intervention is a participatory methodology where people combine their knowledge and experience with the research expertise of consultants to solve real-world problems. This research-practice transdisciplinary partnership is unique in that it works collaboratively to solve problems yet maintains a separation of disciplines and responsibilities between the consultant and the client. The responsibility

¹ Cf. Krainer/Lerchster 2012.

of the consultant is to provide the discipline of theory and methods that guide participants in taking responsibility for defining and solving their own problems. Researchers do not solve these problems with advice, they use dialogue to help participants examine underlying assumptions and generate their own solutions.

Smith and Berg² suggest group life is inherently paradoxical, filled with emotions and actions that members experience as contradictory; groups paradoxically bind more strongly to the same system they are struggling to unravel. Without discussion family problems go unexamined and unresolved and may have a negative impact on business decisions, however with discussion family relationships may be strained, causing members to paradoxically retreat to the relative safety of the known status quo system. Chris Argyris³ suggests individuals, and by extension groups, create defensive routines to avoid blame or loss by “communicating inconsistent messages but acting as if they are not doing so”⁴ to minimize perceived threats. These defensive actions become so routinized as to be rendered tacit operating outside of one’s awareness. Further exacerbating this problem, members of the system may collude to create “undiscussables”, a term Argyris⁵ uses to describe taboo topics that the group considers off-limits for discussion. We refer to undiscussables as “elephants in the room”, a common metaphorical reference to problems that are obvious but ignored because no one wants to risk discussing them. Without discussion of the elephants in the room, deeper assumptions remain unexamined and unresolved. Examination is crucial because assumptions are de facto theory that guides behavior and need to be tested for validity to prevent misguided actions.

As a family therapist would illuminate hidden issues for members to see in a different light, we similarly offer the gift of theory to practice to help clients

2 Cf. Smith/Berg 1987.

3 Cf. Argyris 1993.

4 Cf. Argyris 1993, p. 20.

5 Cf. Argyris 2000.

test their assumptions, often operating without the individual's conscious attention, to generate actionable knowledge for managing a smoother business transfer. As we will show later in the business transfer case, the majority of the elephants in the room concerned assumptions about the relationships, emotions, thoughts, and actions within the family system that were often contradictory to the business issues.

Our orientation for helping clients follows in the tradition of Kurt Lewin, guided by his axiom "there is nothing so practical as a good theory"⁶ that proposes every problem we study is a test of theory. Our belief that theory and practice are inextricably linked guides how we collaborate with clients to help them produce actionable knowledge to solve practical problems. Theory should be aligned, integrated, and in harmony with practice; in this way they are not separate but two sides of the same coin. Theory should be understandable, testable, and actionable in producing practical effects. We understand our partners (consultants and clients; teachers and students; scientists and practitioners) are equal co-producers⁷ of knowledge. Learning is co-created when the practitioners' practical knowledge is combined with the scientists' theoretical knowledge. Collectively developed theories become at the same time practicable and linkable, and can serve as an important basis for meta-reflection on the existing relationships, situations, structures, and social systems. What we are advocating is not developing conventional solutions that maintain the status quo, but rather bringing theory to practice to expand the horizon of all members to foster collaboration to resolve conflict and generate new innovative solutions. As we argue in this paper, cooperative reflection brings elephants (assumptions) out in the open where they can be managed.

In this way, offering theory to practice serves multiple purposes; firstly to point out the elephants in the room (obvious unaddressed issues); secondly to help members address, reframe, and test their assumptions about these

6 Cf. Lewin 1951, p. 169.

7 Cf. Hörning 2001.

issues; thirdly, to generate new actionable knowledge to move forward; and, lastly, to learn together as a system by working simultaneously on their family and business system. Similarly as researchers and consultants we need to test the assumptions (theory) we make with clients that inform our interventions, to be transparent, and to role-model for them so they can develop the same skills we are using.

What we are essentially attempting to do in this project is create reflective family business systems that engage in double-loop learning⁸. That is, they have the capacity to frame and reframe how they act as families and businesses by questioning underlying assumptions and constructing new realities to produce different outcomes. Members are not just solving the “what” of business or family problems; they are changing “how” they are as a system, developing the ability to avoid making the same mistakes while generating different outcomes that produce new learning. This change of how they do things sets the stage for further experimentation, creating a continuous double-loop learning cycle. As consultants we aspire to provide developmental help to clients that weans them off of us by building internal capacity in their own systems for bringing theory to practice as a means to solve present and future problems.

2. Case Project

Commissioned by the Regional Business Development Institute, and in cooperation with the Alpen-Adria University Klagenfurt, a broad-based pilot project was established to examine business succession. The motivations for creating this project were: firstly, the trend towards older owners of businesses was alarmingly high; secondly, there were relatively few start-ups; and, lastly, a high percentage of business succession transfers occurred without planning or external supervision, which led to a poor success rate.

8 Cf. Argyris/Schön 1974; Schön 1987.

All in all, it was a dire state of affairs for business development in the local economy that the institute hoped to change.

The goals of the pilot study included:

- facilitating business succession procedures
- offering cooperative education workshops for owners and successors
- providing consulting and coaching services to help manage the transfer process
- introducing business theory to better inform and influence business practice

Research Method and Evaluation

The project offered several theory and reflection workshops and multiple days of consultation with selected business consultants⁹. During the project we used many forms of intervention, including: different social constellations¹⁰; individual interviews; focus groups with owners and successors; panel discussions, and meetings with the entire family in their company. The team conducted interviews with all stakeholders and observed all workshops and individual consulting sessions. The team knew relationship building was critical to create an atmosphere of trust for open communication. In addition, they needed to have knowledge of relevant theory and good facilitation skills to ensure success. The interviews were story-telling narratives where business owners shared how they got started, including their own take-over processes. Our method of story-telling interviews was actually a consulting intervention that served to bring theory to practice. Every interview, every

9 Altogether nine businesses took part. Both the owners (parents) and the successors (children) were continuously involved in the process.

10 Individuals, Couple, Groups, Parents (Owners) and Children/brothers and sisters (Successor), Employers and Executives of the companies.

story, was an intervention, and every intervention created new data that the system analyzed and used as a continuing learning loop.

While conducting this intervention research we observed many highly emotional situations as families grappled with the contradictions inherent in managing family business transfers. One pertinent example is emblematic of the myriad of emotional issues families grappled with. One successor worried that her parents would die earlier if they were no longer needed in the business, and remarked, “I don’t want to be my parents’ gravedigger!” The consultants knew from the literature on business transfers that the [eventual] death of the owner was a crucial factor that needed to be addressed for the business to successfully move forward. The difficulty was how to bring the unaddressed topic of death into the conversation when everyone was speaking in code using words like “deadline” or “gravedigger”. These words represented the elephants in the room, code words masking the real emotional topic. Continued use of code words only encouraged conversation around rather than directly at the topics. We intervened by asking, “When you use that word, what comes to your mind; what’s behind that word?” It is most important for the client, not the consultant, to address these issues; it is only then that it works. We did this with other vexing emotional issues that if left unaddressed would sabotage the business transfer. In the end, the transdisciplinary intervention process led to creating succession plans with negotiated and defined roles and responsibilities.

The analysis of this research data suggests that aside from the important business topics like taxation and inheritance, other family dynamic topics were present that, if left unresolved, were powerful enough to impede or even block the transition. In the following section, we present those thematic dimensions,¹¹ “elephants in the room” that have a huge influence on the succession process. Acting as good elephants they are rarely acknowledged and seldom talked about by business family members. These are the

11 For those interested, Lerchster 2011 provides a detailed report on the results.

undiscussable topics which are largely considered taboo that the researchers fed into the process in the form of theory¹².

3. Results

The specific contradictions that emerged in the data included:

The triangle of family, business, and property. Since only family-owned businesses participated in the project, we examined the emotional effects of business and property decisions on family relationships. Examples of the contradictions between the family and business systems included answering these tough questions: where were decisions made—boardroom or bedroom?; who makes the decisions—head of the family or head of the business?; who has expertise—the older member or the younger but well-educated member?; what is the currency we keep track of to know how we are doing—money or love?; and, how do we communicate—as colleagues or family members?

The historical development of the family. We considered the family as a social system in isolation from the business since it showed whether it operated as a matriarchal or a patriarchal organizational structure. This is important because in business families the family is not a private matter, and it influences the business culture and structure. Also the collapse of the extended family represents a threat to the business' existence. Families struggle with how to uphold their personal values and ideals and maintain their traditions and traditional role, and yet separating family and business life is virtually impossible to achieve.

The issue of choosing a partner. Another contradiction can be the question of who is the right partner for the successor. Are they from the right family, do they have the right education and experience, do they fit the business, will they have to be managed or tolerated, and should we consider a business

12 In the tradition of phenomenology, dialectics, and process ethics.

contract, i.e., pre-nuptial agreement? These questions provoked considerable conflict, annoyance, disagreement, and resentment when first broached.

Selection versus justice or equality. In families, blame accounts¹³ are usually operating, and in many cases this blame¹⁴ has been amassed over years and is waiting to be redeemed. A catalogue of demands builds up, which can hardly be accommodated and yet still has to be included in the negotiation process. In the course of a succession process parents want to give the business a firm foundation, and yet they may have to select from among their offspring, without disadvantaging any of the children. Children too want fair and equal treatment, or possibly even reparation for subjectively perceived deprivation from long ago.¹⁵

Existential contradictions. The contradiction between old and young and life and death cannot be resolved by simply drawing up a will. Old and young in the same business want to see their wishes fulfilled; however, the urge to make changes and at the same time maintain tradition inescapably clash. The act of drafting the “last will and testament” reminds the old owners of their mortality. What one “leaves behind” becomes most relevant, and the accompanying question of what will remain visible. Succession always has a connection with death, and this taboo issue becomes more visible in the business transition process. In addition to the prospect of personal death the potential for organizational death creates an additional, often more complex problem. The prospect of playing more golf, playing with grandchildren, or developing other retirement activities cannot make up for what is being lost by the owner. This particular contradiction topic becomes one of the biggest elephants in the room.

13 Cf. Boszormenyi-Nagy et al. 1981.

14 Such as for example the preferential treatment of other brothers and sisters or the abandonment which children in business families experience, while their parents are concentrating on building up their business (the business as a “third child” which requires a lot of attention).

15 Several businesses could not distribute the assets equally amongst all the children and some children had to agree to forgo their inheritance in favor of another brother or sister.

Giving versus taking. Every handover is a gift, and gifts come at a cost to both the giver and the receiver. For the giver the cost may be obvious and measurable, i.e., the net worth of the business; however, for the receiver the cost may be the added responsibility to ensure the future success of the business. In addition, it is not only the actual business being given; it symbolically represents the owner's life work created with blood, sweat and tears. The ever-present ancestors, their portraits hung on the wall, bear silent witness to successors actions that honor (or betray) the owner's original intent. For the successor, living up to the myth may be very hard to do.

Theories can influence practice on several levels:

They open up various courses of action. Generating and testing theory serves to develop new options for actions when applied to the world of practice. In this way, theory generating and testing serves to increase human capacity by providing alternative actions.

They rationalize and relieve. When the need is for gaining distance from the entanglement of individual and emotional connections, with the intent of understanding oneself from a collective perspective, then the provision of rational points of view contributes to the reduction of the burden on the system, and also of the strain on the people involved.

They enable the larger whole to be considered. Fundamental theories open up the possibility of catching a glimpse of and directing attention to the individual and collective unconscious—elephants in the room. The underlying issues which affect the particular situation of those involved become visible and available. The result is that issues within the larger system become transparent and can be made concrete and acted upon. In a phenomenological sense, theories offer aspects of what might lie behind behavior.

They connect theory and practice. For a person coming from the scientific community wishing to connect with practitioners, it is not sufficient to provide theories and concepts. The theory has to be connected directly to the practitioners' practice. Practitioners need this link to their world, to what

they are experiencing, in order to open themselves up and thus become receptive to theory. In this respect it is not so much a question of “what?” as a question of “how?” For example, how can theory be connected to the persons involved to help inform their action? How can those affected be connected and simultaneously distance themselves to gain perspective? How can thoughts and actions be linked? How can we help clients combine knowing (theory) with doing (practice) to better manage their challenges? To this extent a theory is to be considered an intervention to be analyzed for validity in practice. Ultimately the decision about what is useful for those involved, and what is not, is made by the individuals and groups affected, and not by the consultants nor science.

4. Conclusion

Our theoretical approach of having members tell stories that invariably pointed out contradictions and tested assumptions was helpful because it allowed everyone to agree that there were elephants in the room, and to openly discuss what they looked like and what to do about them. Unfortunately defensive routines that conspire to block our ability to see the elephants and conceal these emotional topics can have a negative impact on our group processes, in this case family business transfers. In the course of the research workshops we succeeded in moving these topics to the top of the agenda for discussion, thereby helping members address taboo topics, i.e., death or feelings of guilt, and successfully negotiate the mutual concerns of the owners and successors. There was no single best solution or business transfer prescription; rather there was a wide range of solutions that emerged, based on personal family and business needs. The key was the consultant bringing theory to practice to allow the family members to address the obvious but neglected issues. For example, regular family meetings were implemented to continue to work on the contradictions that existed. Wills were drawn up, legal entities were altered¹⁶, inheritances were waived, and the nature

16 For instance from single proprietor to limited company.

of participation was clarified. From our reading of the feedback after the project these were steps that had been postponed for years in order to avoid conflicts, avoidance that ironically prevented the transfers from moving forward. Openly addressing the issues produced new actions that allowed the transfer to occur, benefitting owners and successors alike.

A note of caution: this process takes nuanced and skilled facilitation, mutual agreement and commitment to the process by all parties, sharing of all information, open communication built on trust, time to meet regularly, and a willingness to adjust the process as needs change. If everyone is willing to go on this safari to hunt elephants, they must also be willing to pay the price of challenging their fears and defensive routines, trusting that authentic conversations will bring healthier relationships, better decisions, and happier and more successful family business transfer. Oh, and possibly the extinction of elephants.

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