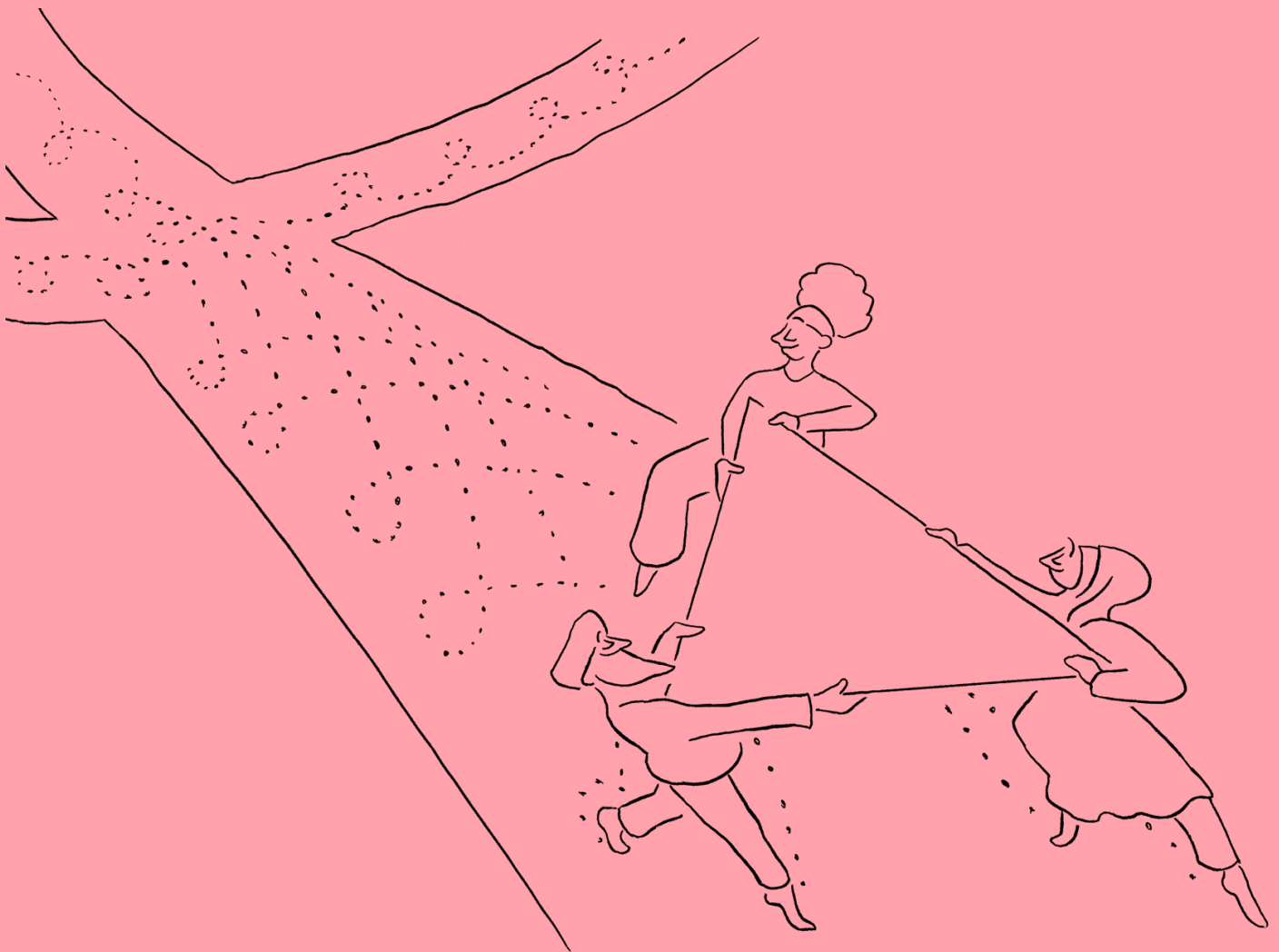


**Metalogue**  
*Strategic change partners*

# Dancing in the Triangle

*Exploration of the consulting relationship in complex  
organisation development endeavours*



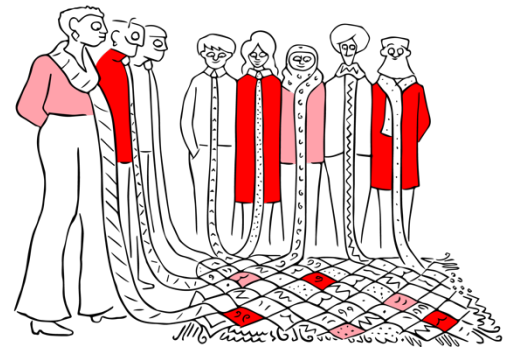
Andrew Day and Sophy Pern  
September 2024

# 1. Introduction

Complex organisation development projects that require strategic, structural and cultural change in large systems usually involve internal staff teams working with external consultants. External consultants are typically brought in for specific purposes, to provide unique expertise or capabilities that do not exist internally and to advise on politically sensitive issues where independence is sought. Internal consulting teams typically come from a range of disciplines e.g. Human Resources, Organization Development (OD), Programme and Project management, Strategy and Operations. They bring an understanding of the organisation's strategic change agenda, its history and culture and planned change interventions.

The success of the work rests upon the internal and external consulting teams working together to establish a helping relationship with the client system. A collaborative and trusting relationship aids the following activities in the consulting process:

- Agreement around scope, intent and methodology
- Sensemaking and insight into organisation dynamics
- Agreement around the challenges faced by the organisation and the necessary interventions
- Containment of anxieties within both the consulting system and client system; and
- The exploration of disagreements and ruptures within the consulting relationships.

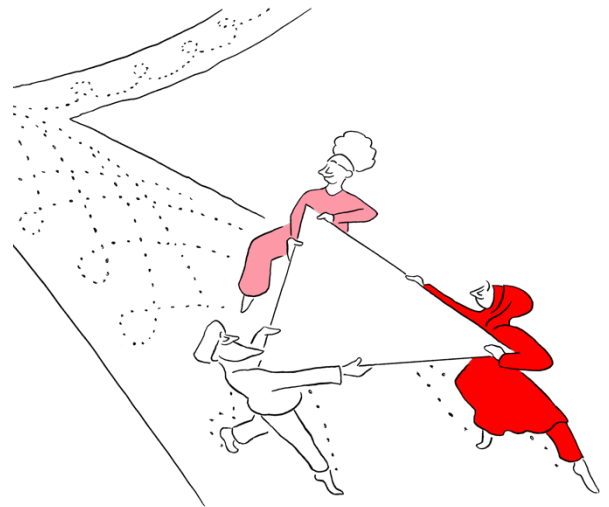


Whilst the differences between experiences of internal and external consultants have been well documented (Block, 1981), little has been written about the experiences of internals and externals working together. Others (Walsh & Whittle, 2009) have observed how hard it can be for consultants to collaborate. Both conscious, rational factors, such as contracts, tasks and roles and more unconscious processes hinder collaboration (Walsh & Whittle, 2009). Our experience supports this observation. Although, we can point to many successful collaborations, we find that the relationship between internals and externals is often complicated and tricky, even though on the surface relations may feel cordial and constructive. This complexity is further increased when multiple internal teams are involved and need to work with one or more external consulting teams.

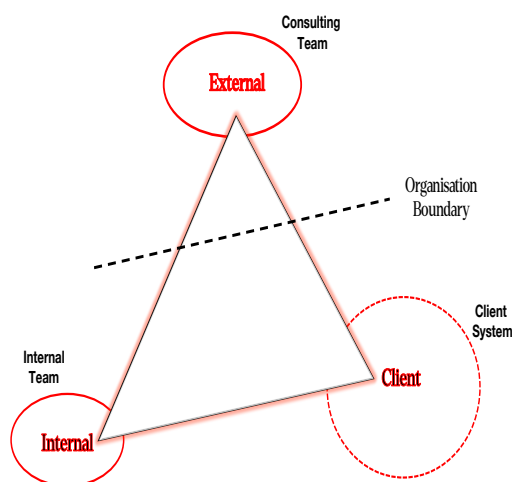
Over the course of a year, we inquired into the dynamics of the consulting relationship in complex organisation development assignments. We did this by reflecting on our past and current consulting projects and by reflecting with our clients and professional associates. This article summarises the central themes that emerged and what we learnt about what enables healthy partnerships between internal and external consultants.

## 2. The consulting triangle

A central observation of our inquiry is that the relationship between internal and external practitioners exists in the context of their relationship with the 'primary' client. The Head of OD for a global corporation, with a long tradition of OD, described this as like 'dancing in a triangle'. This metaphor highlights the connection and moment by moment improvisation that emerges between internals, externals and their clients. Effective collaboration requires that the internal and external are both clear and agree on who is the client and what is the client system that they represent<sup>1</sup>. Figure 1 represents this triangular relationship that is enacted across the organisation boundary. For single consulting assignments, each position in the triangle can be held by an individual. In complex OD projects however, each position is likely to be occupied by a group or multiple groups (i.e. several internal teams may be acting as change agents).



In complex systems identifying who is the *actual* client can however be difficult. Edgar Schein (1999) in his seminal book *Process Consulting* provides some observations on the complexities of agreeing a contract with the 'primary' client. For Schein, this is the individual who ultimately owns the problem or issue to be worked on. We would add that they are also entrusted with the authority to make decisions and assign resources and time to the project. Often intermediaries may act on behalf of the client contacting either or both the internal and external practitioners. In some instances, the internal practitioner may find themselves acting as an intermediary with the external.



As we explored experiences of effective and less effective assignments, we were reminded of how productive consulting relationships rested upon establishing a clear agreement around intention, scope and method with an individual with the primary client. In some cases, early enquiries might end in an agreement to not work together. Indeed, one internal expressed gratitude that an external turned down a project because they did not believe it would be of benefit to the client system.

Figure 1 – The consulting triangle

<sup>1</sup> Often the internal may not think of themselves as being an internal consultant, even though this is the role they are either taking up or need to take up in the organisation development process.

All human interaction is a process of meaning making that is contextual in nature. As we interact with others, we use language and symbols to convey our intent, establish our identities and to create meaning. This process is at the heart of the dance between the different parties in the triangle.

## Context shapes the dance

The participants in our inquiry time and again highlighted how the dynamics of the consulting relationship were shaped by context. The most frequently referenced influences were:

- *Norms and social expectations* influenced assumed trust, who could speak with whom and what could and could not be said at different stages of the work. For instance, in more hierarchical organisations internal practitioners tend to be more likely to defer to clients when they are more senior in the hierarchy. The external however may find themselves being assigned higher status, particularly when their initial point of entry has been with the primary client.
- *History and familiarity*, such as whether the different parties know each other, have worked with each other in the past and have chosen to work together influence levels of trust. For instance, in one large corporate the internal talked about their inherent distrust of a large external consultancy that had a long-standing relationship with the CEO and members of the Executive.
- *Both the size and complexity of the client system and the scope of the consulting project* influenced the complexity of the relationships and interfaces across the triangle. For instance, with large projects the size of external and internal teams creates multiple interfaces between the teams and with the client. For example, one of the authors is currently working with another external consultant and internal transformation team of approximately (6-8 members) and with client representatives for the whole system and each sub-system within it (country and functional units).
- *The values and beliefs of the different parties* influenced how they entered into these relationships. We were reminded of how collaboration is more straightforward in a context of shared values. Organisation Development consulting is rooted in humanistic values such as participation, inclusion and personal growth that reflect a positive view of human nature. Some practitioners recounted stories of struggling to work with consultants who held more commercial or instrumental values.

## 3. Tripping over in the triangle

We identified six scenarios that arise in this relational triangle that tend to undermine collaboration and effective OD consulting. These dynamics tended to be set up when the consulting project was being established.

### Scenarios that undermine collaboration

1. No 'Primary Client'
2. Distant Client
3. The internal acting 'as if' they are client
4. The external by-passing the internal
5. Internal and the external working on competing projects
6. Unrealistic expectations
7. Confluence between two or more parties

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#### 1 No 'Primary' Client

Projects can start with a confusion around who is the primary client. For example, a few years ago, we were asked by an internal OD department to provide support with the implementation of a new operating model. The project had started during the preceding year with the help of a large external consultancy. It had however stalled at the implementation phase as resistance to the necessary changes increased. The VP for HR and several members of the operating committee felt that they needed help to re-engage the organisation. We spent several months, inquiring into the underlying issues and with the OD team attempted to secure a contract with the Chief Executive. We eventually concluded that the executive team was under too much pressure to address short-term results and did not feel able to engage in a project to develop the organisation. In hindsight, we could have been more direct in the early entry and contracting conversations in asserting our need to engage the Chief Executive. This would have enabled us to test their commitment to the new operating model and appetite for change given the many demands on the organisation.

This scenario is not uncommon in large and complex systems. Staff functions may initiate changes that they believe are needed. In some cases, this follows conversations with a potential client and in others it reflects their personal desire for a particular change. The functional lead or internal consultant then initiates a project with the external. However, at no point are the internal and external consultant in direct communication with the 'primary' client. This leads to a case for the external consultant of entry before contracting (Neumann, 1997).

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The absence of a client inevitably plays out in the relationship between internal and external consultants. Without a client, neither have authority to intervene effectively within the system. The risk is that both the internal and external collude with the belief that this is not a problem. At some point however they find that they either cannot establish credibility within the client system or do not have support for making the necessary interventions. To defend against their lack of agency, they may reach for “solutions” that they have the authority to implement, such as a running leadership development or training programme.

False hopes often keep this situation in place, such as the consultants believing that at some point a client will step in and take responsibility or trying harder in the hope the project will gain traction.

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## 2 A distant client

In other cases, a client can be identified, however, they have little or no direct relationship with either the internal or external consultants. Intermediaries may take on the role of ‘go-betweens’, communicating what they believe those in positions of power want or expect. This distance is often attributed to the primary client/s not having time or capacity. Clients may resist getting involved with statements such as: “*you don’t need me for that*” or “*just send me an update when you have done it*”. These may seem reasonable on the face of it, but they tend to be expressions of the client’s ambivalent commitment to the project. In our experience, this scenario emerges because the client is not taking full ownership for the success of the assignment. This is often because of their doubts, fears or competing commitments. The dynamic continues, however, the internal and external consultants avoid confronting the ambivalence. This might be because they are overly deferential to authority figures in the cultural system and avoid making demands for the client’s involvement.

This scenario is likely to weigh heavily on the consultants. They are likely to feel excessive responsibility for the success of the project. This might cause them to be overactive in the client system pushing hard to make progress or feeling that they need to sell changes to the client system.

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## 3 The internal acting ‘as if’ they are client

A scenario, that is related to the above two, is when the internal acts ‘as if’ they are the client. Often the starting point is a request for the external consultants to respond to a tender or deliver a solution rather than help a client work through an issue. This often leads to the external feeling they are in a ‘pair of hands’ or ‘sub-contractor’ role. They might feel pressure to accept at face value the presenting problem and the proposed course of action. For instance, in the entry process for a new project we asked a project lead in a client system: “who was the client”. They replied indignantly that they were the customer. After several meetings during which we were unable to reach agreement on who we needed to agree a contract with, we chose to withdraw from the project.

Often this scenario arises because the internal consultant has taken excessive responsibility within the client system for addressing some underlying difficulty. Alternatively, the internal or external may accept a subordinate position in the client system, believing that they need to accept what is being asked of them by the leadership of the organisation.

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The false hope that keeps this dynamic in play is the external consultant trying harder to please the internal and neglecting their needs. This typically requires them to hold back from expressing their doubts, fears or concerns about how the project has been contracted within the client system. Our inquiry suggested that the consultants in this scenario feel frustrated, without a voice and in a one-down position.

## 4 The external by-passing the internal

Internal consultants were quick to recount experiences where external consultants had entered their organisation at senior levels and overlooked or even actively excluded them. In one global corporation the Head of OD expressed a concern that a large consultancy had spread 'like a virus' through the system. They felt that their role was to control the consultancy and protect the interests of the organisation.

Externals may not intentionally by-pass the internal teams. We noted several scenarios where the client, such as the CEO, had engaged us directly in a project. In some of these cases, we were later contacted by the internal team to offer their support. In other instances, knowing the organisation, we actively reached out to individuals we knew or became aware of in the client system. In at least one scenario however we only later became aware that an internal team was frustrated that we had not made greater efforts to involve them.

## 5 Internal and the external working on competing projects

We identified situations where the internal and external consultants were asked to work on separate consulting projects that overlapped and address interdependent issues. For instance, in a public sector organisation we witnessed a large restructuring project being undertaken by an external consultancy whilst the internal OD team was simultaneously running a culture and values project. In this dynamic, each party may see the presence of the other party as a threat, or competition for leadership time and attention. Instead of collaborating and integrating their efforts, they either compete or retreat to a safe distance from each other. Such a scenario can arise because the primary client simplifies and separates issues rather than thinks systemically about the development of the organisation. Alternatively, different individuals in different roles initiate competing projects again without thinking systemically.

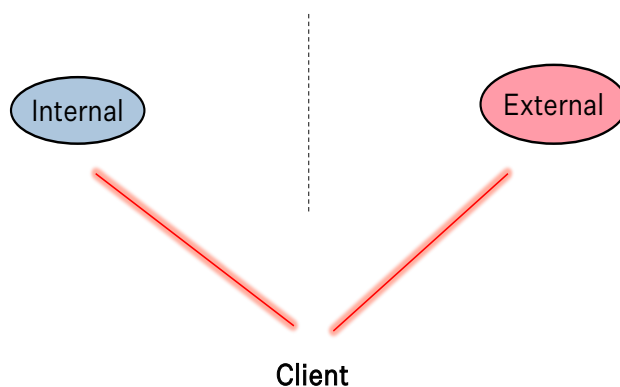


Figure 2

## 6 Unrealistic expectations

The client and/or the internal sometimes possess unrealistic expectations of what is possible and the capabilities of the external. This could also extend to the external who may have unrealistic expectations of the other parties or indeed their own capabilities. This scenario may arise for a range of reasons. The client may be avoiding responsibility by taking up a position of dependency with the consultants or they may have leapt to simplistic solutions to avoid facing the complexity of their situation. Alternatively, the consultants may be unwilling to confront or challenge the client on their perceptions, beliefs and hopes. In most cases, the client or client system will ultimately be left feeling disappointed and critical of either the internal or the external consultants.

The trap for the external consultant is to collude with the client's fantasies and expectations of them. This may be because of their collective hubris and unwillingness to confront reality.

## 7 Confluence between two or more parties

In some cases, we observed that the internal, external or client become confluent. This arises when individuals find it difficult to hold different perspectives. Each loses their role, emotional boundaries and their capacity to think about the client system. For instance, the internal and external may complain to each other about the client without informing the client about their observations of the impact of their behaviour. Alternatively, all three parties can become too close. This could be represented by a collapse into unrealistic optimism or resigned helplessness. Either way the different individuals involved lose their sense of self and capacity to express their different perspectives or observations.

**Confluence Internal – Client**  
*Split client system - internal*

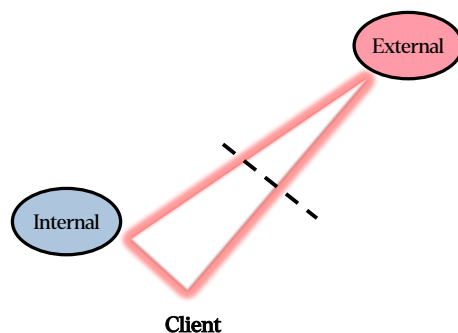


Figure 3

**Confluence Internal – External**  
*Objectifying the client system*

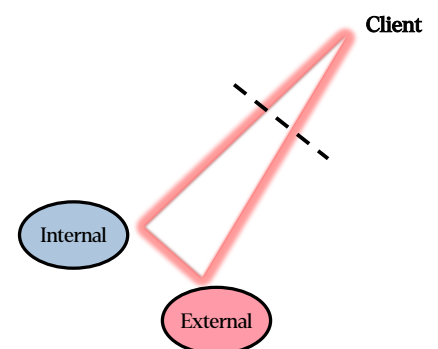


Figure 4

## 4. What makes collaboration tricky

Each of the above scenarios is characterised by ambivalence, confusion of responsibilities and ambiguities in expectations between client, internals and externals. In our experience, this is a common feature of complex organisation development initiatives as the client system grapples adapting to unknown and novel events and demands. Our hypothesis is that this points to difficulties that the different parties experienced in speaking clearly and directly with each other and in making explicit agreements. We believe that these difficulties arise because of several related human processes that underly consulting relationships. These are:

- Power and politics
- Marginality
- The dynamics of triangular relationships, and
- Self-differentiation.

### Power and politics

Each party brings with their explicit and implicit interests and needs that may be congruent or in opposition with each other. For instance, a project can offer significant financial rewards to an external consultant or an opportunity for visibility and profile for an internal consultant. Equally, who has access to whom and who can say what to whom within an organisation shapes the consulting relationship. Power and status imbalances can influence what individuals are prepared to say or are willing to hear. These may relate to issues such as: who chooses whom, perceptions of competence, and relative status within the organisation and the wider profession.

### Marginality

Consultants work on the margins of systems – operating with *one foot in and one foot out of the client system*. As one participant observed *‘even though I am internal, I do equally feel external within my organization’*. On the boundary of the client system, consultants whether internal or external can gain perspective and avoid excessive confluence (Nevis, 1987). This is somewhat of a precarious position. Too much affiliation risks assimilation and collusion with the client system. Too much separation however comes with the risk of being perceived as an alien and being rejected.

Through our inquiry we noticed our anxieties about being an outsider in client systems and our vulnerabilities around being rejected, or “spat out”. We might for instance fear losing a client which would have both economic and emotional consequences. We equally noted we tended to keep our fears to ourselves. In some relationships we felt that our needs to feel significant, liked, or to belong were met. In other projects, we felt that we were often having to assert ourselves or felt that we were feeling dissatisfied or ignored. When we reviewed an early draft of this paper with an internal consultant, she commented that she: *‘had never thought about external consultants having needs and worries’*.

## The dynamics of triangular relationships

The family systems therapist Murray Bowen (1978) argued that triangular relationships configure around the dynamics of inclusion and exclusion, power and influence (Bowen, 1978). He argued that in a triangle, two parties are always closer to each other, leaving the other as an outsider. When tension is low the preferred position is to be on the inside. When tensions rise however the preferred position shifts to being in the outside position (Bowen, 1978).

Both the positions of closeness and distance can stir up conflicting feelings in the different parties. Closeness can feel too intimate or intense, whilst being on the outside may stir up feelings of competition, envy or jealousy (i.e. a desire to be closer). Being on the outside gives a greater sense of autonomy and independence, whereas to be closer provides a sense of belonging.

In figure 5 (right), for instance, A might experience a desire to move away from B, whilst simultaneously B (in the outsider position) feels the need to move closer. As the triangle reconfigures the motives of A, B and C may start to shift.

In our inquiry, we picked up anxieties from internals and externals around the extent to which they felt included, listened to and heard by their clients. We experienced clients that wanted to keep us at a distance or others who would pull us in closer to them. We also heard reflections on the shadow side of the triangle.

Some practitioners acknowledge that at times envy, competition and rivalry were present in their relationships with other consultants. These feelings were rarely acknowledged directly by the different parties.

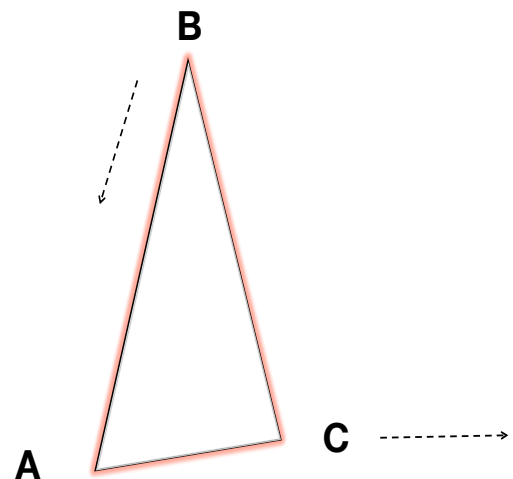


Figure 5

## Self-differentiation

Murray Bowen also observed that healthy relating necessitates an individual's capacity for self-differentiation from others whilst staying in relationship with them (Bowen, 1978). Likewise, a strong consulting relationship is one in which each party feels able and willing to freely express their thoughts, observations and feelings. Clients, internals and externals each bring their own perspective, ideologies and beliefs to the relationship. These have generative potential yet also can lead to difficulties in the relationship. On the one hand, they can help generate a deeper and richer understanding of the situation as each can see and understand different elements of the situation (see figure 6 below). On the other hand, fears around conflict can cause individuals however to hold back from expressing themselves clearly and explicitly.

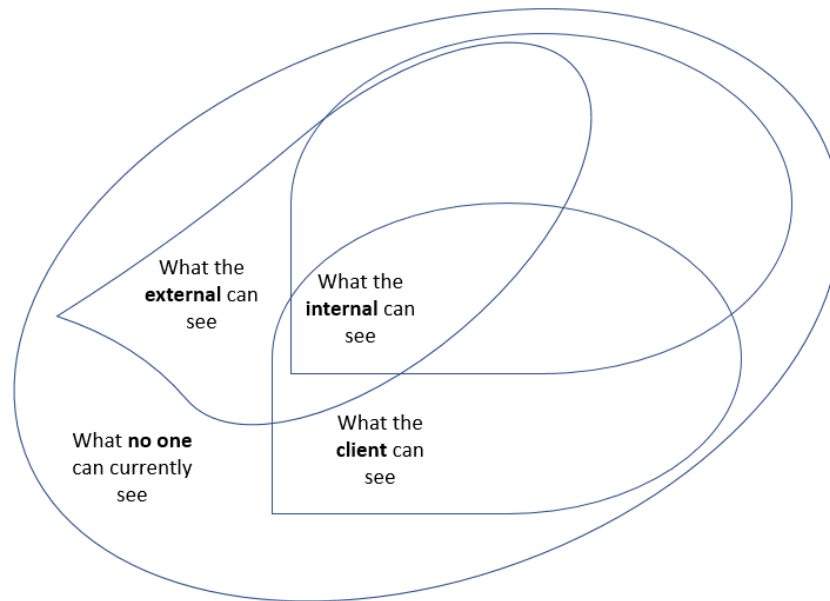
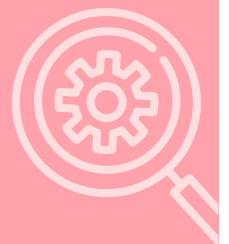


Figure 6 – Perspectives in consulting projects

In the consulting process each party encounters risks and experiences vulnerability. Generally speaking, the greater the risk experienced within the client system, the greater the anxiety experienced by the client and the consultants. If the consultants and client become overwhelmed by their anxiety, then defensive reasoning is likely to arise. This might lead to avoidance of difficult topics or necessary actions. When this happens, each party seeks evidence to confirm their current ways of seeing the world and reject information that is inconsistent with it.

## Parallel Process

These underlying human dynamics can play out in this consulting triangle in ways that can mirror dynamics in the client system (Critchley, 2011). For instance, in one case we examined, the primary client who had not been engaged in the early stages of the assignment criticised the work of the external consulting team. The internal consultant then excluded the external from the project. This turn of events could be understood as a replaying of a pattern of criticism, blame and rejection that was present in the client system. The consultants involved later recognised that earlier contracting and inquiry with the client could have led to an understanding of the underlying processes that needed to be surfaced in the work. In another case, we repeatedly found ourselves in meetings where we were uncertain of the purpose of the meeting, our role and what was the work the client wanted to undertake. This often left us feeling ambivalent and confused. When reflecting on these feelings we started to see that our experience was reflective of the client's ambivalence and a deeper and pervasive sense of ambivalence across the client system. In summary, ambiguities in contracts, roles and boundaries often indicates the presence of covert and unacknowledged processes in the consulting triangle.



## 5. Creating the conditions for collaborative consulting

Our inquiry has heightened our awareness of practices that together can create the conditions that enable constructive consulting relationships. In essence they are characterised by a relationship in which the different parties are curious and willing to inquire into the system and its dynamics rather than assuming understanding and jumping to action. This requires a shared commitment to “jointly deciphering what is going on” (Schein, 1999a, p. 6) and a relationship of partnership and mutuality between the internal, external and client. We noticed that such relationships were characterized by a quality of intimate *contact* between the different parties. At its best, the relationship is open, alive and direct whereby each party could express themselves as best they could in the moment and feel heard by the others.

Clarity around roles, boundaries and contracts are important enabling conditions. Our findings suggest that the consultant, whether internal or external, needs to consider three simple yet important, questions:

- 1) Who is the primary client and what is the client system?
- 2) What is the contract with the client and between the consultants?
- 3) What roles do the internal and external consultants need to take up to help the client system?

The more complex the project, the more likely these basic questions take time and effort to answer. When in doubt we would advise consultants to ask these three questions explicitly of each other and representatives of the client system. We observed how first steps are (often) fateful in consulting projects. Early interaction conversations help to establish the conditions and tone for effective consulting relationship.

Once established then the following practices contribute to effective consulting relationships:



### Regular and explicit three way contracting

In complex consulting projects, the consultants need to set up a three-cornered contract (English, 1975) – see figure 7. This consists of a contract between the internal and the client (‘the internal contract’), a contract between the external and the client (‘the external contract’) and a contract between the consultants (‘the consulting team contract’). Both the internal and external need to be explicit about what they need to do to undertake the assignment beyond financial and delivery expectations. When each party feels they have a contract then they are more likely to feel power and agentic in the relationship.

The process of contracting needs to keep both the whole client system as well as the whole organisation development cycle (i.e. entry, contracting, discovery, feedback and confrontation, intervention and evaluation) in mind (Neumann, 1997).

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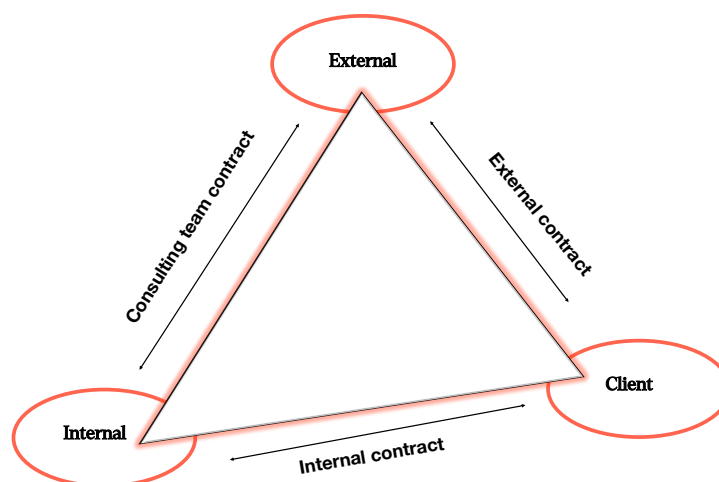


Figure 7 — The three – cornered contract (based on Fanita English's (1975) concept)



### Getting clear on roles within the consulting team

The consulting team contract requires, the internal and external to get clear on their roles and how they will work together. Is the internal an internal broker the external the client; are the internal and external working as co-consultants; is the external a 'pair of hands' (Schein, 1999) providing important expertise and time to support the internal; or is the external shadow consultant to the internal? This represents some of the array of possibilities for the relationship between the internals and the externals. These roles can and may need to change over time. Equally, clients need to take up their role and authority within the client system and cannot delegate this to the consultants.



### Sense-making with and without the client

As we have argued above, tensions that arise in organisation development interventions can be understood as part of a systemic pattern or parallel process (i.e. the consultants becoming involved in underlying conflicts or tensions between different groups and roles within the organisation). Tensions can, in other words, be thought about and understood. This does however require processing time and attention for the consultants and the client, a shared commitment to "jointly deciphering what is going on" (Schein, 1999a, p. 6) and a relationship of partnership and mutuality between the internal, external and client. At times, it helps for internals and externals to meet separately from the client to reflect on the work and their relationship. At other times, this needs to happen between all three parties.

Our inquiry highlights that relational dynamics can enable or undermine the consulting process in complex systems. Consultants would do well to acknowledge this reality and attend to their relationships with the different parties involved. Being sensitive to the hidden and covert processes, such as vulnerability, power, inclusion and exclusion, helps consultants understand and empathise with the other players

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in the triangle. Signs of anxiety are likely to be indications that attention needs to be given to what is happening under the surface.

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### **Modelling clear, direct and authentic communication**

Healthy consulting also supports client to make free and informed choices in response to valid data (Argyris, 1970). This requires authentic communication and space for the client to say 'no' as well as 'yes'. By making full and vibrant contact with the other parties, consultants can support productive reasoning (rather than defensive reasoning). The more we become fused and undifferentiated with the client the less likely they will succeed in this endeavour. We can hold our boundaries and avoid over-adapting to other's anxieties, by noticing when we are sanctioning what we say, do or feel. We can also challenge ourselves when we or others fall into patterns of defensive reasoning by placing responsibility onto others, making untested assumptions about other's motives or making generalised and vague statements about others. Being aware of the difference between what we are saying and what you are thinking and feeling but not saying. Equally, we can notice if we are disconnecting from the other parties in the triangle and losing our connection with them. Moving towards others, rather than away, helps us to maintain contact and productive reasoning.

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### **Use of self and supervision**

The consultant's emotions reactions, thoughts and feelings can provide insights into what is going on in the consulting relationship and the wider client system. We might feel uneasy, bored, frustrated or excluded. Examining our responses can be the first signs that underlying issues are at play in the consulting process. Reflective practice (Schon, 1983), supervision or shadow consulting can help us to make sense of our experiences and question the roles we are taking up. Helpful questions might include:

- What is in, or out, of awareness?
  - What can be discussed? What can't?
  - What are our assumptions e.g. of sameness and equality?
  - How much tension can we tolerate?
  - What's mine and what is from the system?
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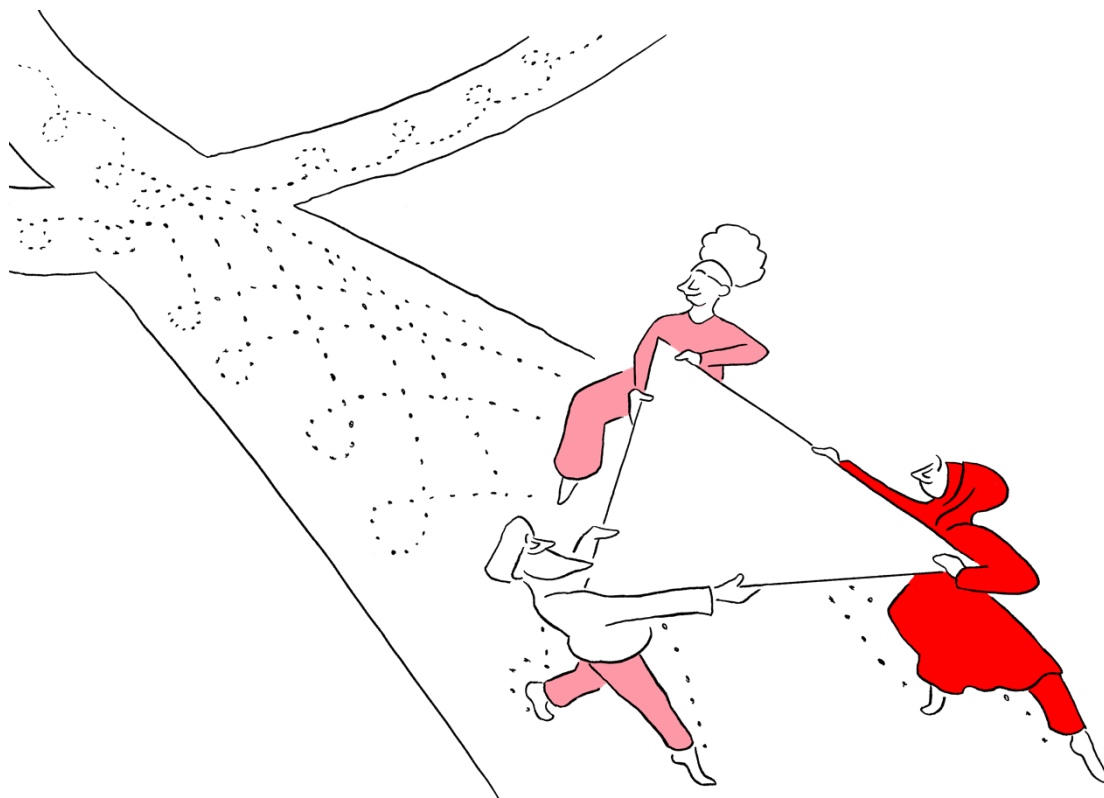
## 6. Summary and Conclusion

**In conclusion, in complex organisation development projects the relationship between the primary client and internal and external consultants plays a central role in whether the project is a success or not.**

Consultant vulnerabilities and anxieties surrounding issues such as inclusion, competence, and intimacy often intersect in consulting projects. These can result in the avoidance of ambiguities and unspoken issues that sets up difficulties in the consulting work, leading to ineffective interventions, and unsatisfactory dynamics for everyone.

Patterns of avoidance and collusion simply amplify difficulties, whereas careful observation of the dynamics of the consulting relationship, recognizing the nuances of power and relational patterns can yield valuable insight about the broader system and what is required.

A commitment to the relationship, and explicit and ongoing conversations about roles, contracts and boundaries is crucial for effective, and satisfying work for all parties in the consulting triangle.



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