The Internal Consultant:
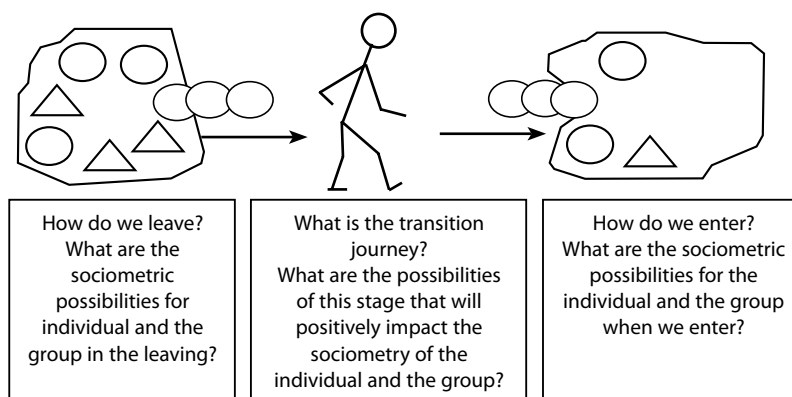## The Sociometrist Working With Transitions

by Helen Phelan

Helen is a Sociometrist and an internal consultant in organisational development, applying sociometry in her work in the public sector in Western Australia. She loves living in Perth and teaching Tai Chi, and is currently applying psychodrama through her developing coaching practice called "Coaching In Action". This article draws on her sociometry thesis.

Transitions are everyday processes; some we take on as joyful challenges, others we move through with little consciousness and in some transitions we experience great difficulty letting go of the old or moving through to the new. As an internal consultant I am interested in the transition processes experienced by people at work. As I developed in my psychodrama training and in the use of sociometry, the links between the sociometry and the transition process have for me become more integrated, and I recognise there is great potential in the transition process for applying positive sociometric interventions. By attending to the sociometry at an individual, group and system level, the internal consultant can contribute to the spontaneity and flexibility of all involved. Not attending to the sociometry may leave individuals isolated, groups and their members less connected, and the status quo in place.

Diagram 1: The Transition Process – Rich in Sociometric Possibilities

How do we leave? What are the sociometric possibilities for individual and the group in the leaving?	What is the transition journey? What are the possibilities of this stage that will positively impact the sociometry of the individual and the group?	How do we enter? What are the sociometric possibilities for the individual and the group when we enter?

Sociometry enables the internal consultant to work with the very essence of human relationships in the workplace, and to experience and articulate the shifts in the relationships. It also provides a way of understanding how relationships collectively contribute to shifts in the networks, connections and culture of the organisation.

There are special challenges for the internal consultant. In his book "Flawless Consulting", Peter Block (1983) recognises the particular issues for internal consultants, and their position as being "more delicate and more vulnerable" (p 106) than similar situations that external consultants experience. Antony Williams (1991) recognises that the consultant and the consultation itself could become part of the restrictive solution. By this he means that the solution would support the status quo rather than be an enabling solution allowing new things to emerge. This is particularly a concern for an internal consultant dealing with pressures from the organisational culture, of which they are a part, and their own position in the hierarchy.

On the other hand, from my experience the internal consultant has the advantage of knowing much of the history, politics, stories, heroes and networks of the organisation.

In the world of organisations, transitions from group to group are a large part of the working life for many people. In large organisations, there are new employees arriving and others leaving almost weekly. There are changes in formal leadership and line-management positions, and often people are assigned to work groups with little attention to the transition process. There are many meetings and cross-agency groups working on various projects, and the membership of these groups change without

notice. The image for me is one of those fast-forward videos of bustling city intersections, with people going somewhere but with little opportunity to connect with each other. At these transition times, people are often given little or no preparation or warm-up and few integrating group processes when they enter or leave each group. These organisational processes sometimes leave people isolated, or leave groups unconnected to other groups in the organisation.

The core work of the sociometrist as internal consultant is to create the environment that assists in building the number of positive relationships in the workplace. Building those relationships by intervening in ways that positively build the sociometry through the transition process is one avenue that contributes to this work. This article presents a brief case study that illustrates this approach in practice.

The Work Context

The setting for the work is a large public sector organisation with a number of widely dispersed service delivery branches. It is a strictly hierarchical even para-military style organisation, and its service delivery is controlled by many laws and detailed operating procedures. The management direction articulated by senior management is that they want a more open management style, working in a more collaborative way with the community, the government and other stakeholders.

Some things have shifted, however what remains are some of the strong traditions, authoritarian aspects of the management style, the hierarchical management structure and many of the strong sub-groups that existed previously. There remains a lot of competition, particularly between individual

managers and between separate work units. Despite the very formal organisational structure, many of the working relationships are through informal networks.

The structure of the organisation is such that there are some hundreds of small work groups organised and managed through the hierarchical management structure. Most decisions have to go "up the line" at least one level, but often two, three or even four levels.

Case Study: Sociometry Between an Individual and the Group

Susan was a 35-year-old woman who was on a rehabilitation program after having been severely traumatised in a work situation some three years ago. She had been gradually returning to the workplace over the last 12 months, and was being treated for post-traumatic stress syndrome by a psychiatrist. She had recently been transferred into a work team of 10-12 people.

The new manager of this work team, Celia, had supervised Susan in another area, and had arranged for her to come across to this work team. The demands on the manager, new to her position, meant that Susan did not receive the attention or introduction to the team that she wanted. Most people in the team hadn't known that she was joining the team, or why she was there. There was also no workstation for her. Susan felt she was living under the label of "rehab" and experienced these recent events as rejection. The dynamics between Susan and some members of the group were quite negative; she often acted angry and defiant and told suggestive jokes in a loud voice. This

Diagram 2: Susan's Position in the Group before Interventions – Isolated Rejectee
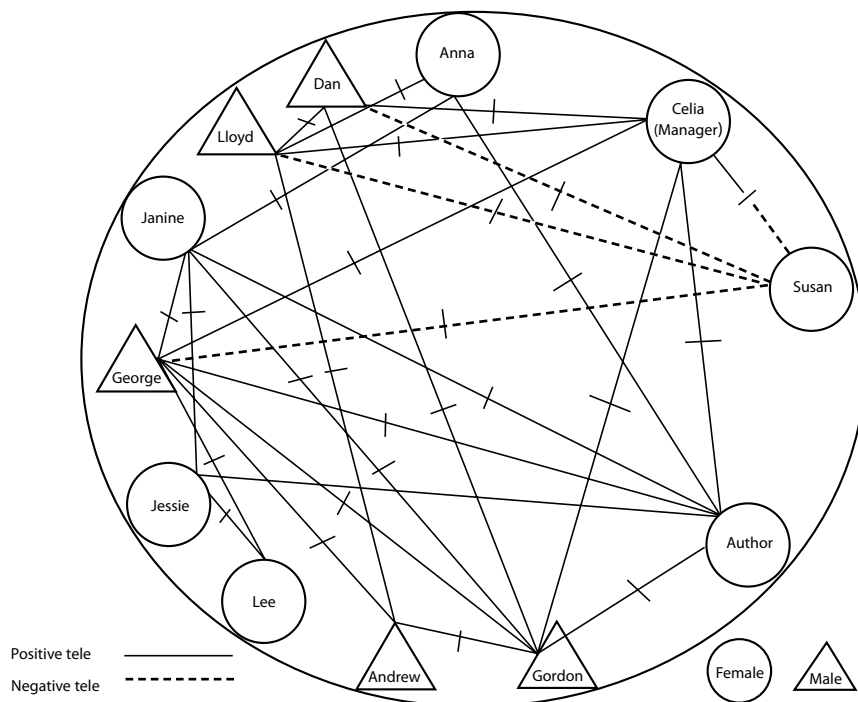
triggered some team members, and they responded with disapproval, attempts to quieten her or withdrawal from her.

I was asked to supervise Susan on a specific writing project after she had been in the new work area for two weeks under the manager's general supervision.

After our initial connection, I spent some informal time with her sharing some stories about when I first came to work in the agency, and asked about how she had come to this group. She shared with me several aspects of her own work history and experience, and told how she was getting moved around a lot, and had come here at the request of the manager because she was supervising her rehabilitation program. We talked about the work we were to do together and the way we might go about it. She then expressed a desire to be doing something to change the organisation, so that other people did not have as "bad" an experience in rehabilitation as herself. She referred quite negatively to some of the other group members and the manager. I asked her how she would like to have come to into the group.

Susan: "Well, they could have told me about it when I was in the other group. I just turned up one day and they said I had to come here. I didn't even get to say "see you later" to some of them – you know, tell them that I was going and where I would be."

Author as Consultant (C): "Yes, and what about coming into this group?"

Susan: "Well, I don't know anyone, can't find a place to sit, it seems like everyone wants to get rid of me."

C: "Do you have an idea of how it could be more like what you want it to be?"

Susan: "Well, they don't even know why I am here. Maybe if they knew that, it would make a difference. And I would like a place to sit that is mine for a while."

C: "It would be good to think about how you could help those things happen."

We agreed to meet the next day. I reflected on the situation around her transition into this group and thought that a good intervention might be to "repair" the current transition process, and work with her to develop roles that would assist her in connecting with this new work team and in making future transitions.

First Intervention

I asked Susan if she would like some other people to support the work she was doing. She agreed and I suggested that this could also assist in her feeling more connected to the group. I also suggested that perhaps, as a first step we could arrange for her to work with a small group of people that she felt some link to. She agreed and named two women from her previous group that she thought would be interested in supporting her on the project. I then asked if was there anyone in this current team she would like to work with her. She said Anna. With some encouragement Susan did the inviting and they all agreed to meet.

The meeting went well. The group talked about the experience of moving from one work area to another. They said that it was good when they knew what was happening, and also when they could keep contact with people in the group that they have left. They were pleased to see Susan and she, in turn, appeared relaxed and positive with them. Anna joined in and told her own story of the difficulties she had experienced moving from another area fairly recently.

We then talked with Susan about how we could help in the next steps of her work. She said she felt a bit stuck as she had a lot of research information but didn't know what to do with it. She asked for ideas. The others gave her some suggestions that she wrote down. She got quite excited and started to think of things she could do in the report. We talked about the session and whether or not we wanted to meet again like this or find other ways to stay in touch and to support Susan's work. They all thought this was good but various ideas came up about future get-togethers and I said I would leave it with them as they obviously had good energy to continue in various ways. This they did by meeting several times over the next six weeks.

Analysis After First Intervention

Susan was conflicted in her roles. She seemed to want to be part of the group, but reacted to her situation in a way that triggered roles in the other members that resulted in her being rejected and isolated. By engaging with her warm-up to be connected, I encouraged her to choose some people that she was warmed-up to. I encouraged her to take a risk by inviting them to work with her; she did and they agreed. This seemed to give her more confidence and at the meeting of the small group, she was able to open up about the difficulties of moving from one group to another.

Susan was a sociometric 'rejectee', and

Diagram 3: Susan's Position In The Group After First Intervention - Connections Developing
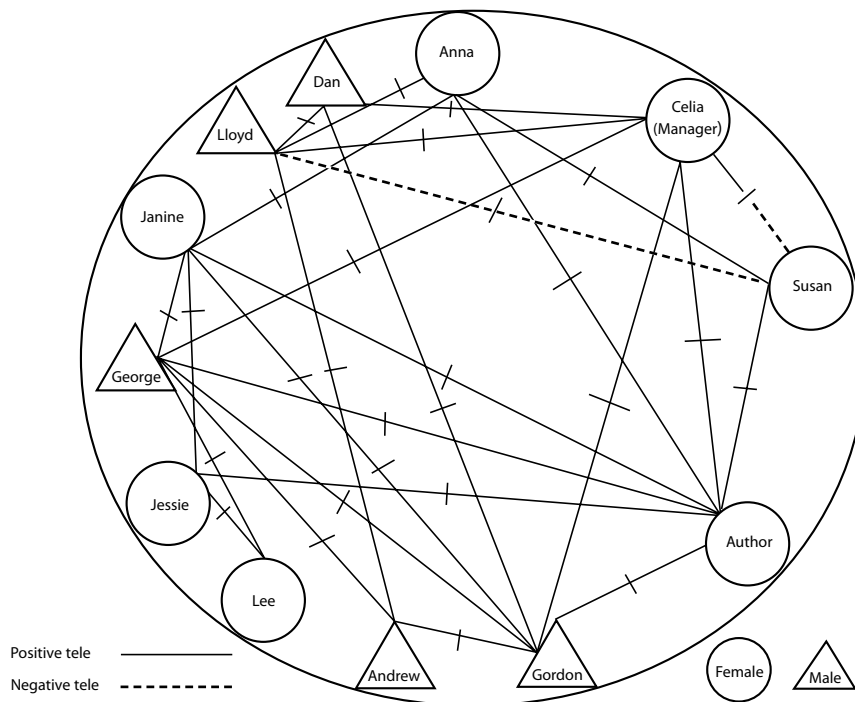
was in an isolated position– from her old group and in the new. When I was open and empathic with her, she seemed to open up and began relating well to me. She was later able to develop roles of cooperative worker and open learner in the work with the other women. She was then no longer a sociometric 'rejectee' and no longer in an isolated position.

Susan had developed roles that enabled her to make the transition out of the old group and into the new group, connecting with at least one other member beside myself. After the session with the women, Susan's behavior changed. She built on the relationship with Anna and they shared time in shaping the report. In addition, word got around to the other group members about what she was doing and people began to engage with her about her project.
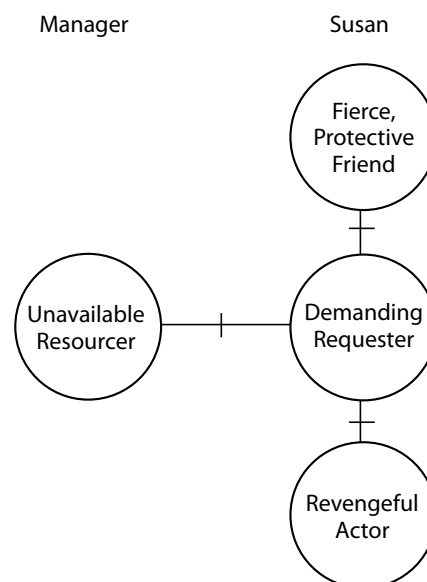
Second Intervention

Through this time of the writing project, Susan appeared unable to approach Celia, the manager, remaining angry and distant, despite attempts on Celia's part to engage her.

Susan had recently become friendly with Rita, a young woman who had newly arrived in the area. One day Rita went to Susan crying about her work situation. Susan became very involved and urgently sought out the manager Celia, who was unavailable at that time. Instead, Susan spoke briefly to one of the senior officers in our area. Only a short time afterwards, she was not satisfied with what she saw was lack of action and took it into her own hands to make a formal complaint to a more senior level manager in another area. This senior manager then followed-up and later spoke to Celia, as Susan's actions had begun a formal complaint process.

When Celia asked to see her concerning the issues she had raised, Susan came rushing up to me. She was very agitated, and gasping with short frequent breaths.

Susan: "Oh God! What'll happen now? She wants to see me in twenty minutes. Oh Jesus – I suppose I've done it now! Oh well, they deserved it – why didn't they do something! I couldn't just sit there and see Rita crying and do nothing!"

Diagram 4: Susan's Roles In Relation To The Manager

Manager   Susan

Fierce, Protective Friend

Unavailable Resourcer

Demanding Requester

Revengeful Actor

I stood next to her saying "I really needed to do something!" She quietened for a moment and looked at me. I took the opportunity to guide her into the nearest office, as we were standing in an open-plan area. Once we were seated, she related enough for me to realise that she had acted and was now highly fearful about the consequences. She began to cry and shake. I sat next to her and said, "I have really shocked myself." After a minute or so, she began to quieten and breathe more deeply.

C: "This is very fearful. Can you look at me now?" She did. "What you did – it was about something important to you". She nodded. "Where inside is this coming from. What is this important thing".

Susan: "I wanted them to do something – no one was listening to Rita, and I thought … I got frightened"

C: "Yes you looked terrified?" She nodded. "What was this terrifying thing?"

Susan: "My friend that was living with me before – they didn't listen to her and she committed suicide. They wouldn't come and do anything to help me. I found her". She began crying loudly and yelling, "I'm not going to see her!" (referring to the Celia the manager)

C: "Let's just be with you for the moment". I sat with her as she cried. Her crying lessened to a sob and she looked up at me.

C: " This was very loving, this thing you tried to do for Rita." She sniffed and nodded. "When you focus on that part of you – what do you feel?"

Susan: "I feel quiet – good. That is good". She began breathing more deeply and sighs.

C: "And you made a decision about how you acted for Rita?" She nodded. "What else do you know about your decision, and what the manager wants to see you about?"

Susan: "She'll tell me off because I went to the other manager".

C: "Let's just stay with you and what you know. You were saying how you felt good just now, thinking about your reason for helping Rita. Can you stay with that part of you?"

Susan: hesitates …"Yes"

C: "Can you stay with it as you think about how you went to get help?"

Susan: "Yes"

C: "Can you stay with that motivation in you as you think about being asked to follow up with Celia?"

Susan: "Yes – I suppose. But I can't go in there with her."

C: "Well when you went to the other manager, he would have said to you that the next step is to follow up with your manager. Is that so?"

Susan: "Yes, but."

C: "The thing is, what you are telling me is you want the manager to take the issue of helping Rita seriously. Is that right?"

Susan: "Yes"

C: "What you know at some level is that this meeting with the manager is how this can really begin to happen – helping Rita."

Susan: "Yes"

C: "What I also notice is that when you connect with your own motivation you are able to feel the good intention in that, and you seem to be quite still in yourself."

Susan: "Yea I do". She smiled and looked down.

C: "You will need to follow up with the manager……

Do you think you can take this stillness and your motivation to the meeting?"

She sat thoughtful for a few moments and then began to smile –

Susan: " I think I could you know."

C: " When you think about the meeting - How do you think it would be for the manager with you coming in quite still and with yourself?"

Susan: "OK - yeah"

C: "And how might that help the conversation you both have?"
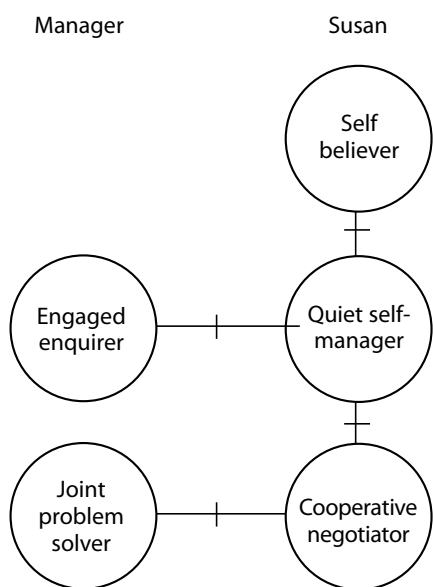
Susan: "I reckon it would be easier"

C: "And with an easier conversation – do you think you might get some good help for Rita?"

Susan: "Well better than if I went in how I was just now, eh!"

C: "This still in you seems quite strong when you get in touch with it. Like a quiet self-manager." She nodded. "Could you choose something to be this quiet self-manager. Something you could take into the meeting with you?"

Susan held up the empty cup she had in her hand, smiled and then noticed the time. She smiles. "OK – gotta go." she says, and went off to get a cup of tea. Some six or seven minutes later I saw her go to the manager's door and knock, cup of tea in hand. She was standing quite erect as she went in the door.

Diagram 5: Susan's Roles In Relationship To The Manager After Second Intervention

Manager   Susan

```
                        ( Self
                         believer )
                            |
( Engaged          ( Quiet self-
  enquirer )——|——   manager )
                            |
( Joint
  problem         ( Cooperative
  solver )——|——    negotiator )
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She later came to tell me that the meeting had gone well. She was able to talk to Celia about her motivation; she had learned from Celia how she could get access to her in the future; and had agreed to go with her to the senior manager to clarify the complaint. Celia had promised to follow up with Rita,

which she later did. Susan and Celia have since had cordial conversations and she went to Celia several times to provide updates on the progress of her report.

Analysis of Second Intervention

Susan had been a sociometric isolate, initially with no positive connections in the group. By warming her up to her role of creative group member she was able to form relationships with a small team of women. In the second intervention, I took the position of 'double' to help her articulate her internal motivation. This brought forward her role of self-believer in knowing she had good motivation in her efforts to seek help. The roles of quiet self-manager and cooperative negotiator emerged and she was able to face the discussion with the manager, and negotiate an agreed approach that importantly assisted herself and her friend. See Diagram 6 opposite.

Diagram 5: Susan's Roles In Relationship To The Manager After Second Intervention

By expanding her roles, she was able to begin to establish working relationships with members of the work team. The sociometry of the whole group shifted and more positive relationships were built. Even in a conflict situation with her manager, she was able to be cooperative in the problem solving, and continued to build the relationship. The healing in the transition and the development of roles enabled Susan to have a range of positive relationships with the work team members and the manager. This in turn added to the functioning of the whole work team. My contract had been to enable Susan to successfully complete her report and I considered there were sufficient positive relationships for Susan to function well and complete her task.

Diagram 6: Susan's position in the group after the second intervention
- Adequate positive connections

Positive tele ———
Negative tele - - - - - -
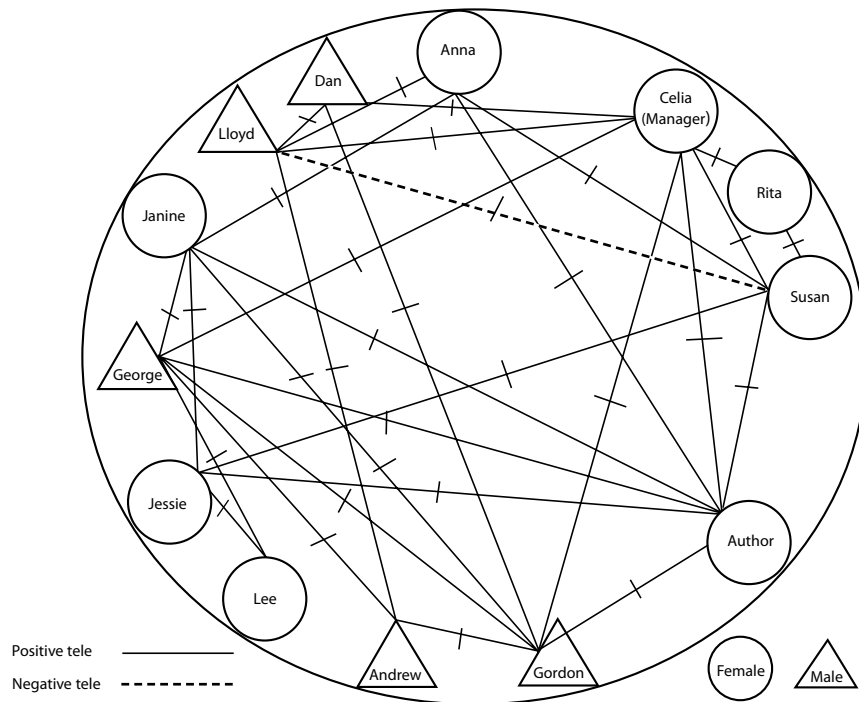
This work on transitions could be enhanced by further developing the knowledge of the group about their own processes in dealing with transition. In Moreno's work on sociometry, he emphasised the "co-researcher" role, and the need to share the data and information about the group sociometry with the members themselves. It was not appropriate at that time for me to engage in this level of work from my role in the organisation, however it would be useful to seek the opportunity to develop it in other groups. This would develop the full knowledge of all participants in the transition processes and the sociometric data as well as experiencing the action. In this way, participants could make decisions on their own interventions in the system, and the sociometric outcomes that result from the interventions. Truly co-creators.

In working with transitions, the sociometric approach highlights several dimensions that have proved a valuable guide for me as an internal consultant:

• The individual and the groups involved in the transition process are part of the wider organisational system. As a member of the system, the internal consultant is therefore subject to, and must be conscious of, the cultural pressures and sociometry (networks, sub-groups and connections) of that system.

• The role or stance the internal consultant takes can significantly impact the group dynamics and the connectedness between group members. Taking on the role of participant-observer provides the basis for interventions that encourage co-creation of enabling solutions.

- Having awareness of, and attending to the sociometry of the work team, the consultancy group and their own sociometric position, enables the internal consultant to intervene in ways that build the positive connections required for the work to develop.

- The work of the internal consultant is greatly enhanced by having fluidity in their sociometric position within the 'base' work team and within the 'consultancy' groups. The use of warm-up, spontaneity and role development can build this fluidity, not only in the consultant's sociometric position, but also for other group members. This provides conditions for spontaneity and creativity to emerge within the group, and for rejectees experiencing isolation, to experience connection and inclusion.

- When the group participants are warmed up to the intervention through spontaneity and role development, they are more able to recognise the current state (the cultural conserve) as the 'springboard' for the new, rather than build resistance and defend the status-quo.

The methods and principles outlined in this article add to the development of the transition process as a positive intervention in organisational life. This may have further implications and applications as the organisational world adapts to globalised companies and rapid restructures that demand that their staff have the capacity for transition flexibility.

Conclusion

This article provides an example of how the internal consultant makes positive interventions in transitions within an organisation. Transitions from group to group are everyday, but significant, moments of opportunity. Positive interventions at the points of transition, using warm-up, spontaneity and role development, may assist in building the flexibility and functioning of the individuals, the groups and the internal consultant. By developing new consciousness about the transition process, the moments of leaving, journeying and entering groups, the internal consultant can provide a positive contribution to the strengthening of the sociometry of the group, the individuals and the organisation.

Moreno (1953) presented a vision of individuals cooperating to create a society to meet our highest aspirations. He sees our capacity to change the world towards this vision by simply bringing into consciousness our own social functioning, and demonstrating ways we can build strong and positive sociometry. "This is the meaning of revolutionary, dynamic sociometry" (p 29).

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