

Common fantasies about the consultant's role

When hiring a consultant, clients often have hidden assumptions that can lead the process astray.

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There are probably almost as many reasons for hiring consultants as there are family business owners in America. The most commonly stated ones include: the development of a succession or strategic plan; the design of governance structures such as a board or a family council; the management of conflict among family members and between different stakeholders; and, simply, the training of relatives for their various roles. However, over the years I have noticed certain recurring—and usually hidden—assumptions about the consultant's role among clients who have called on me for help.

The first of these hidden assumptions casts the consultant in the role of savior. He or she can do no wrong and is put on a pedestal by family members as the one who will “fix” all that's wrong with the system, a Moses who will “lead us into the Promised Land.” Such inflated expectations carry serious risks. Often influenced by an unconscious wish to “fix” something in their own family background, consultants can easily lose perspective on how much they can actually change in a family business.

The consultant can serve only as a midwife to change; like it or not, the client must deliver the baby. To believe otherwise is a setup for disappointment. Nothing will really change, in fact, until the client takes personal responsibility for seeing that it does. There may well be some truth to the old saw that “a consultant is someone you lend your watch to so he can tell you the time.”

A second common role that clients hope a consultant will play is that of reassuring friend. What clients really want in these cases is not independent judgment but generous amounts of reassurance that “everything is all right.” For example, they seek validation that they have been good parents; that their children are, in fact, competent to take over the business; that it will all work out in the end, like a Hollywood fairy tale.

The consultant who dislikes confrontation can be easily trapped by the client's denial. He or she may assume a passive role and just coast through the process. After all, no one likes to deliver messages to a parent like: “Sorry, your kid simply does not have what it takes to lead this business,” or, “Given that your children have been fighting since the age of two, it would be naive for you to set them up in a sibling partnership.” Sooner or later, however, reality catches up with the owner who does not want to face the truth: The successor fails, the business goes into a tailspin, the most competent non-family manager quits in frustration. The “reassuring friend” has not been a friend at all but has, in fact, colluded in the development of the crisis.

Third, there are those who hire a consultant to be the keeper of their secrets. Typically in these families there is considerable conflict but none of the members dares to raise the issues openly for fear of a meltdown. The consultant is given the impossible mission of trying to bring about change while avoiding all of the issues that the family has refused to face for years.

Consider, for instance, two brothers who have been in business together for 25 years. While they are quite cordial in each other's presence, when alone with the consultant they confess their deep mutual resentments and distrust. Privately, each expresses suspicions about the other's intent, and harshly criticizes the other's children and spouse. Each brother would like to change the other's viewpoint without openly revealing his own true feelings. The consultant thus becomes the confidant of both partners and shares each person's innermost thoughts and feelings—a situation that can become seductive for consultants who harbor unsatisfied longings for inclusion and power.

The experienced practitioner will not be seduced, however. The consultant will realize that he or she has become the third leg of a powerful family triangle. Risky as it may seem, the only way out is to persuade the brothers to deal openly with each other. They may continue to deny their differences and blame the consultant for stirring up trouble. In order for the consultation to succeed, client and consultant must work through this resistance.

Fourth, there are those who hire consultants to be their ambassadors to the rest of the family, or allies against them. These are people who want an outside authority to argue their case for them, to legitimize their opinions with other family members, or even to take up arms against those who hold contrary views. As in the case of those who seek reassurance, these clients may disapprove when the consultant tells them in an initial interview: "Even though you're paying the bill, I won't necessarily agree with everything you say."

To be effective, consultants must be able to offer independent judgment on what is best for the business. Overall trust in the consultation process increases when the rest of the family realizes that the consultant is on no one individual's "side." The consultant is there to look out for the well-being of the family and the business. As in the case of the founder who refuses to plan for succession, the agenda of the person who signs the checks is not necessarily aligned with what is best for the whole system. If you are deeply disappointed the first time the consultant disagrees with you in a meeting, you may not be fully aware of your hidden agenda in hiring the consultant.

Some of the reasons for hiring consultants are often beneath awareness, and the phenomenon of transference, well known to clinicians, is common. What this means is that clients often unconsciously "transfer" to the consultant feelings and images derived from earlier relationships with family members like parents and siblings. Such fantasies can affect the process in powerful ways. Ideally, consultants are trained to be aware of them and work with them. You don't want a surrogate mother or a brother as a consultant, you want someone who can help you move your business into the future and

ensure its health. By working with and raising awareness of transference at opportune times in the process, a skillful consultant can help the family business move into the future. However, not all professionals advising family businesses are specifically trained to pay attention to these dynamics.

The consultant, in turn, must be alert for signs of “countertransference”—the dynamics of the consultant’s own family of origin are likely to color his or her view of the client’s family. Obviously, being trained to work with these dynamics is no guarantee of immunity from them.

So where does this leave the business owner? While it may seem paradoxical to talk about attending to dynamics that operate outside of awareness, you can get some insight into them by monitoring your own reactions to the person you hire.

The first meeting with a consultant often provides abundant clues to your hidden assumptions. When people meet for the first time, they have little information about each other and tend to fill in the gaps with their own wishes and expectations for the relationship. After the first meeting with a consultant, ask yourself questions like: Why do I want to bring in a consultant? What do I envision the consultant doing for me personally and for our family business? What assumptions am I and others in my family making about this consultant? Am I inadvertently withholding information or doing anything else that might sabotage the process? Does the consultant seem to be leveling with me? Do I feel I can discuss these issues openly with the consultant? The answers to these questions can provide useful clues to some of your hidden assumptions.

The consulting process is unlikely to succeed without a realistic assessment, from the start, of what can and cannot be accomplished. When consultant and client have congruent expectations, when both are alert to the hidden assumptions and wishes that may affect the process, their relationship stands a good chance of being productive. The willingness and ability of both sides to talk about these issues as they arise may very well be the key to success.

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