

Organisational Constellations meets Appreciative Inquiry

A creative experiment in integrating two organisational transformation disciplines

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*Published in Positive Approaches to Change, eds McKergow, M., & Clarke, J.
Cheltenham: Solution Books*

Introduction

Working separately in the field of organisational development for the past fifteen years, we have been working together for the past few months on some exciting new possibilities for bringing together the emerging work of Organisational Constellations with the more well-known approach of Appreciative Inquiry (Ai). We want to share with you some of our thinking and excitement as to how these approaches can possibly support and enrich each other, whilst respecting the strengths they individually bring in their own right. Indeed it is our contention that only by standing so powerfully as approaches in their own right can we look for inter-connectedness without a loss of integrity of either approach.

One immediate difficulty in recounting the story of this inquiry is that there is so much to say about both approaches to convey the power and depth of the history and philosophical underpinning of the approaches. For the sake of brevity we can only provide you with an overview of the essence of the approaches and how we see useful links between them. We assume the you will be more familiar with Ai and its benefits, but may be less familiar with Organisational Constellations and what these are, so we will spend more time explaining constellations (If this is not the case, please look at our references for more information on Appreciative Inquiry). In brief, organisational constellations are an approach to whole systems working which looks at the issues and dynamics of an organisation using people as live representative to provide feedback on the system. It bears some similarities to Moreno's psychodrama, except that crucially it looks at the consequences from the past, and works with hidden loyalties from the past as well as revealing the dynamics in the present. It can also work with the future in the present and point to resolving energies as well as bringing insights about the deep underlying, difficult issues that are holding a team or organisation back.

Constellations work from an epistemological basis that we are all part of an interconnected universe and thus can tap into an "in-forming" or "knowing" field using a level of knowledge beyond our rational or imaginative processes. It differs from the more humanistic Appreciative Inquiry which is a whole system engagement process designed to use the intuitive and creative possibilities of the system in a real time way. So why do we want to bring them together and possibly try to mix oil and water, when they stand so well alone?

The benefits of an integrated approach

One driver from the constellating perspective is that the constellation generates really powerful insights, but these are often done in the privacy of specialised constellation workshops whereby organisational leaders can work through their deep issues in a confidential setting. We want to make these powerful insights more available to the rest of the organisation. Indeed one Account Director we worked with on his relationship management issues told us "You have given me the Enigma code, now all I need to do is crack them, to bomb the submarine." You may not like the militaristic metaphor, but it does talk to the power of his experience and to a gap in "where next...". As a constellator Sue was already aware of the importance of the three stages of the before, during and after of a constellation that could optimise the constellation in a transformational process. In short, some wider engagement process seemed necessary.

A driver from the Appreciative Inquiry perspective is the potential for the depth of insight that could really deepen and enrich the Discovery phase. Some of the beauty of Ai is in the appreciative discovery of heightened moments of what or when a system is working really well. Much can be done with this positive building momentum that takes people away from the moan and groan that can de-energise groups and foster secret or overt blaming and scapegoating. Whilst providing a positive platform for change that is owned, transparent and inclusive, the team in an Ai process may not face up to the deeper underlying patterns that can pull the organisational transformation off course, or lessen its impact. Starting with a constellation that points to the hidden issues, underlying patterns and unacknowledged realities of the system can fundamentally refine the focus of the Ai question that starts off the whole four-stage process.

Towards more sustainable transformation

If this is the story of how we have started to connect the potential for the processes, then our next step is to look deeper at how they can add value to an organisational journey of transformation. Like many other whole systems consultants, we have noticed that most change initiatives provide temporary improvements in situations, but that the underlying dynamics of the organisation remains the same. We also appreciate that some of the enduring qualities of an organisation clearly are beneficial; a compelling vision aligned with a sense of the founding purpose and a strong brand can provide coherence

to the organisation that is more than a glue holding it together. There are however, underlying patterns of behaviour and meaning making as well as circumstantial and context issues that reduce the change agility of an organisation and, we have discovered, consume an energy that could be re-directed for transformation.

We think that organisations have an immense amount of energy, but are often caught in knotted patterns or "entanglements" that prevent the healthy flow of this collective energy. Despite years of interventions the sum of the collective is not always more than the sum of its individual parts. There are usually pockets of excellence, individual heroes and moments of peak performance, but there is a collective sub-optimal performance. We are not interested in maximising one part of the system at the expense of the other, nor are we interested in moving the problem from one systemic element to the other in the appearance of making progress. Radical and sustainable transformation means re-constructing organisations in a way that makes it easier to deal with contradictions, opposites and multiple systems of thinking that we face in today's economic environment.

Our shared guiding principles for transformation

Bringing these approaches together requires us to think in terms of connecting operating principles. Some of these are:

- Working with analytical or verbal methods alone will not always work if we want to bring about deep-seated and sustainable change. Our normal way of knowing things in organisations and our normal beliefs about how we know things are much more limited than the intuitive knowledge that is actually available to us.
- We cannot undo behaviours of the past, but can acknowledge the consequences of what is and within these constraints make new choices.
- Our familiar stories that govern the leadership of change processes is only a partial truth, and is not the way the system is. Facing the hidden realities is a daunting task and needs a supportive change process that operates with integrity that goes beyond a loyalty to the commissioning client.
- Systemic behaviour can only be understood in its wider context and with new internal images of the future - new felt experiences - people are genuinely able to move away from their false loyalties based on covering hidden dynamics to co-creating tangible futures around their purpose.
- New behaviours will really make the difference and are often the simplest ways to bring about change, once people are free to behave in new ways.

What is organisational transformation?

As part of our co-inquiry into how can we bring about radical and transformative change in organisations we asked ourselves what "form" it is that is being trans-formed in an organisational trans-form-ation. We believe that the "form" that is undergoing a radical transformation of its parts into a new a greater whole, is the form of meaning making, how people view the organisation as a system and the resulting distribution of energies within the system. One of the critical insights from Bert Hellinger, who founded constellations in family systems, is that love doesn't just automatically "flow" in the most beneficial way for all family members. He discovered that there is an architecture to the flow of love based on acknowledging everyone (including the forgotten or not-mentioned family members) in a system and everyone finding their right place. The resolved constellation providing a new internal image and a new felt experience for the issue holder, i.e. new (more compassionate) meanings which would continue to work, long after the completion of the constellation.

In organisational terms we have found that working with the unconscious assumptions about the form, naming the taboos, acknowledging what isn't being said, or looking at the scapegoat as a doorway to an unspoken tension start to relax the system and release energy for change. For instance, in one constellation there was an apparent tension between a representative for profit and a representative for revenue. When revenue was moved to a new position, thus changing the spatial relationship between profit and revenue, we started to see a new relationship between them. A simple statement from revenue to profit, "Revenue comes before profit" reinforced this change. The manager's insight was that his problems did not lie in his efforts around revenue or profit, but in the relationship between them. It seems so easy and clear after the insight, but had lain outside of his conscious awareness until that point. You can start to see how the discovery phase of the appreciative inquiry may be altered as a result of this insight. Ai with its emphasis on the intuitive dream phase and its more tangible collapse to form at the design and delivery phases then seems to add a consistent and yet different enough process to catalyse the deep insights of a constellation as a transformational tool.

A brief overview of Constellations

Constellations and Ai are both action-orientated approaches in that they point to new actions and behaviours that will support change. A constellation starts with an interview identifying the really burning issues that occupy the issue holder in a system. The constellator most importantly listens to the issue without judgement, as no one is to blame for a series of inter-connected issues. The interviewer is thinking *relationally*, of hidden patterns and of consequences over time and does not want the detail of the familiar organisational story. Detachment from the issue holder is a vital skill at this point.

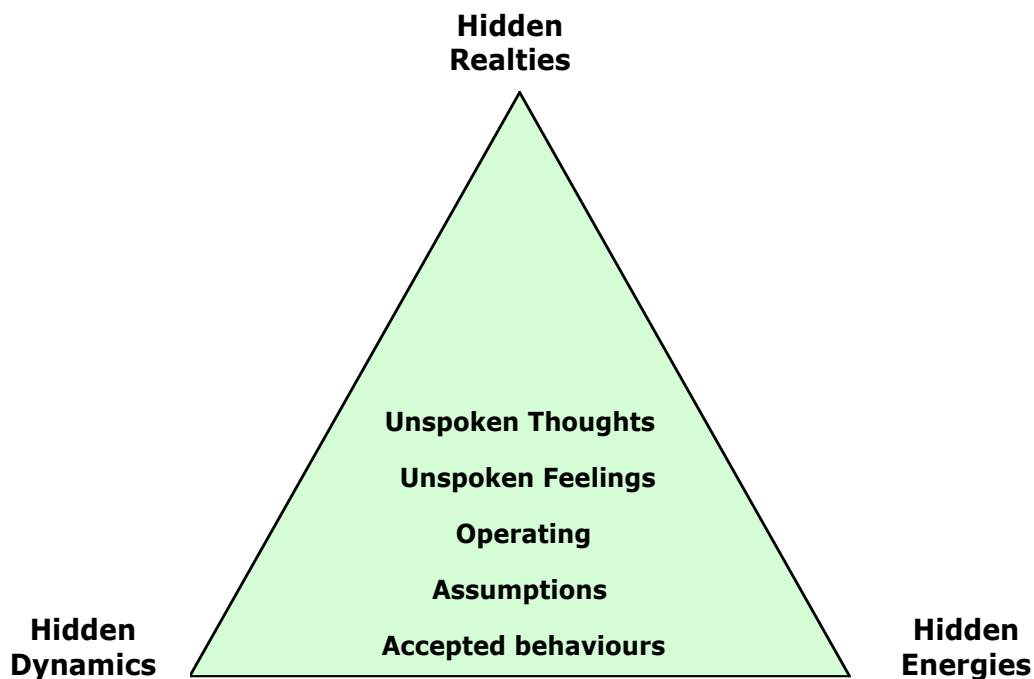


Figure 1

A constellation is set up by the issue holder using representatives often people who know very little about the organisation. The client puts people who represent parts of their system in a space that represents the system. The client, or issue holder, will walk the various representatives to a place that feels comfortable. The representatives are asked to report on how they are feeling with regards to other representatives. People are asked to focus on sensation and how their body feels, and to disengage thoughts and judgements. These sensations are usually uncannily accurate even though the representatives probably have no prior information about the system that they are representing.

As the constellation is set up it externalises the inner image that a client has of his or her system and represents it in three-dimensional space. It reveals the underlying dynamics that shape a system stripped of the details and points of view that lead to opinions and judgements. It reveals the hidden dynamics or the relationships between the things that make up the system. It also points to the hidden energies for change within the system, revealing where people would like to move and who seems to be holding tensions for the system or appears weighted down inappropriately.

To draw on a more rational, but possibly more familiar experience, a constellation is rather like using a spreadsheet where it is possible to see how changing one value will effect all others. You can move things in the system and see how the rest of the system responds to the change. In a constellation with an entrepreneur we looked at his issues with his Regional Development Agency and the local university and resolved some of the historical problems in their relationship. Turning to the future we saw that adding the "customer" to

his constellation improved the constellation, but adding "prosperity" really brought it to life. People started to literally energise and to smile, shoulders dropped and you could feel the resolution. This entrepreneur changed his vision and his business plan as the result of the constellation. By slowly building the elements he could see both the critical dynamics that he needed to face and the complexity of his system that he had to work with.

Through this process of working with representative feedback, the constellation points to the strains within the system and shows what might be possible within the given realities of a situation and where support might most economically and usefully be focussed so that change can take place. Experimental moves are made and sentences are given in the constellated system until a resolution is reached in which all members of the system have their appropriate place and feel more at peace. The constellator makes the experimental moves guided by the representative feedback and through stilling the mind and listening more to his or her intuitive or tacit knowing. It is simple, but not easy to do.

The moves include things like shifting people's position to make sure there are clear lines of vision, taking into account existing hierarchies, or re-including marginalised or excluded members. The moves help to establish a better flow of energy through the system by everyone having a place and being in their right place for the function they serve. The sentences are used to face into the hidden realities of the system and to resolve hidden dynamics. In a post-merger situation, for instance, it was important to use situations to acknowledge the difficulties of the merger discussions and the old loyalties to former organisations. Acknowledging "what is" is often the critical intervention of a constellation. We can then release energy for new possibilities and new internal images of the system.

Appreciative Inquiry

For Appreciative Inquiry to be effective, it is important that all the relevant PEOPLE are in the room for the inquiry: those who are responsible and needed to make the change happen. The appreciative inquiry finds the energy for change in an organisation based on what has worked well for the organisation in the past and helping to move that into the present.



We begin by Discovering our strengths in areas where we have had success in the past. Using what we have discovered as 'resources', we ask the team to consider what else they could build based upon those wonderful resources. It makes sense, after all, to build upon what works, rather than what doesn't. This is called the Dream Phase and we focus on the best of what could be. We build on the energy and use it to create new possibilities together.

The next part is the Design Phase where the group decides which part of their dream they want to make happen and in what order. This is a time of negotiation between people most especially around how they can support one another. At this stage we may need to draw upon more traditional consultancy methods such as performance metrics to identify the new capabilities and design how they will be developed. Creating communities of practice can be one very good process for continuing the inquiry at this stage. The

final part is the Delivery Phase where each individual who wishes to, stands up and commits to do his or her part of what was to happen. This leads to the next steps and further opportunities for reinforcing the insights from the original constellation, or if necessary conducting further focussed constellations as the organisation progresses with the change process.

Insight led transformation - the key to deeper more enduring change

We have already acknowledged that there are strong separate uses for both of these approaches, and indeed are aware of other transformational techniques such as systemic coaching to leverage the insights from a constellation. Increasingly as constellations are starting to take place within organisations and a leader needs to move forward with the insight from the constellation as part of a wider organisational transformation, we believe that designing an appreciative inquiry to focus the new energy for change within the organisation is an extremely effective method to use.

The first step we have pointed to in this integrated approach is to use a constellation to provide a depth of insight into a change process. The wisdom of the constellation is working with the below the radar issues and with acknowledging what really cannot be changed. Participants see key movements within a constellation, which point towards next steps, and occasionally reveal very clear decisions that need to be made. Sustaining the deep insights is the next step. This helps us to see where we need to focus the appreciative inquiry as a way of bringing the wider system together around these new insights. A whole system engagement process can then really add value with integrating the change process. We feel that Ai is an especially appropriate process because the depth of insight from having participated in the constellation gives a person a very positive impetus for change. We believe that the Ai will be more successful as a result of the deeper starting point and with the released energy from the old loyalties and old patterns of behaving. Our next step is testing and refining the best combinations of these approaches in relation to client needs. We hope that we have found a way of combining field and systems thinking in a positive and appreciative way that will enable a client organisation to transform in a largely self managed way, and that will enable it to develop the most appropriate capabilities for moving forward with its own vision and purpose and really strengthen their place in the market in a sustainable way.

Resources

The Appreciative Inquiry Commons run by Case Western Reserve University – <http://www.appreciativeinquiry.cwru.edu>.

An emerging case study

Sue was asked by a Talent team leader to constellate an issue around the relationship of Talent to HR in a changing business environment. This was an in-house constellation and so required sensitivity to the power and trust issues that are present. In such an case it is often better to offer an insight constellation, which gives new insights about a situation, as opposed to a resolution constellation which points to a resolution that suits all the stakeholders, as this may involve facing more than a team new to constellations in a work environment are ready to face. Clearly, contracting around the expectations is critical.

Two representatives for Talent and HR were set up. The first striking thing about the representatives was that they were all facing the same direction. They were asked what were they looking at? They all agreed it was the future of the business. This was also represented, which changed things. The Talent representatives felt small in relation to HR. The HR representatives on the other hand split with one feeling felt very powerful and police-like, whilst the other felt more interested in the Talent. As the constellation progressed the Talent team seemed to want to stay loyal to values such as trust as honesty, whereas HR were happier with business values. The wider business was also added and Talent reported being torn between wanting to move closer to the business and staying near HR. Business also lost interest when Talent and HR seemed more interested in the issues between them than in the business issues.

As an insight constellation, the Talent team felt that this was an important piece of work, pointing to the need to clarify their identity, their business model, their relationship assets and their values. Until this point they were locked into, "it isn't fair what HR are doing," and couldn't see a route to action. There appears to be a need for some strategising work in terms of how they can move closer to the business as partners rather than suppliers. They may also require work on the business fluency and language, so that they seem "less innocent" than the constellation was revealing.

One way that we could move forward is around an inquiry that looks at times when there has been a very clear sense of identity for the business unit and this means times when they have partnered well. People were not totally clear about what they meant by partnering and understanding and clarifying this will help people to do it better. To do this, we can ask:

- Tell us a story about a time when you experienced an excellent partnering relationship with HR. What happened? What were you doing? How did it feel? How did others react?
- Tell us about a time when you experienced an excellent partnering relationship with the business. What happened? What did you do? How did it make you (and others) feel? How did others react?
- What were the differences? The similarities?

Using what we discover from these two questions we can build new ways for people to work that incorporate the best of both partnership relationships and helps to strengthen the team identity, their alignment and their ability to partner with other parts of the organisation.

Biographical note

Sue Abbotson PhD is an organisational constellator and whole system transformation consultant. For the past two years she has been working as a researcher and practitioner for the nowherefoundation. Her focus has been on leading the integration of organisational constellations with wider transformation processes. She also works as a systemic coach supporting the resolution of organisational constellations.

Patricia Lustig is Managing Director of LASA Development UK Ltd. She works at all levels and has exceptional experience with understanding European and Asian cultures where she advises national and international organisations, both in the profit and not-for-profit sectors. She specialises in the use of Appreciative Inquiry (Ai) as a change methodology and is particularly interested in developing the next generation of Ai practice, linking into the creative process.