

## **Contextual Influences on Team Effectiveness & Consultant Identity: Implications for Consulting & Consultation**

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*This conceptual paper explores the influence (socially, organizationally, and within teams) of context on team effectiveness models and the role of consultant identity. As a result, this paper introduces a new model to explain team effectiveness and, by way of example, considers the influence of context on both the role of consultants (their identity) and the change intervention method chosen.*

### **INTRODUCTION**

Unprecedented, non-stop environmental turbulence accompanied by a progressively accelerated rate of change causes deep concern for businesses today. Almost half a century ago, Emery and Trist (1965) recognized the dependency of organizations on their environments and identified the increasing complexity and pace of environmental change. Since that time, Clarke (1994) and others (see below) repeatedly reaffirmed these observations. At the brink of the 21st century, Nadler and Tushman (1999) declared, “Poised on the eve of the next century, we are witnessing a profound transformation in the very nature of our business organizations” (p. 45). Weisbord (2004) borrowed the term “permanent whitewater” (p. 185) from Vaill (1996) to depict a world of “accelerated change, growing uncertainty, [and] increasingly unpredictable global connections of economics, technology, and people ... producing [relentless and often unfathomable] ‘irreversible general change’” (p. 186). Warrick (2009) predicted that this trend, set in motion by the convergence of historic forces, would be the future norm. Few people deny the inevitability of change; however, its rapid acceleration alarms even the experts. Our fast-paced world demands that organizations adapt or perish. Thus organizations are undergoing phenomenal challenges in comprehending, anticipating, and responding effectively and in a timely manner to these remarkable trends. However, despite sincere, intense, and extensive efforts, few corporations manage change as well as they would like.

At the same time that modern-day enterprises vigorously and steadfastly tackle the relentless challenge of progressively accelerated environmental change, organization development (OD) continues to evolve as both an art and a science. Cooperrider (2005) described organizations as a “triumph of the human imagination” (p. 1), but, even in the wake of the immense challenge of change, organizations demonstrate inclinations toward underlying natural patterns, and survival efforts (Cooperrider, 2005; Cameron, 2008). To experience ongoing success, organizations need to adapt by interfacing more

dynamically and shaping their response to change. Organizational effectiveness and resiliency require relentless management of adaptive behaviors by all who are involved in the challenges: individuals, groups, organizations, *and* consultants. As Weisbord (2004) stated, “Productive workplaces ... require continuous work on both ourselves and on our structures” (p. 323). OD is, however, not limited to structural and behavioral aspects, nor is it restricted to those affected by change. The discipline also considers cognitive and affective responses (Smollan, 2006). Adaptive changes hinge on the ability to learn, and *learning*, not just being trained, is now an essential aspect of life. The capacity to adapt and learn extends beyond managers, organizational members, and customers—it also encompasses change agents. No one is untouched by change, and no one is untouched by the *need to change*.

Despite significant advancements, a disconcerting gap persists between change efforts and the rate of successful, sustainable adaptation to change. Even with all we know, “the brutal fact is that about 70% of all change initiatives fail” (Beer & Nohria, 2000, p. 133). In light of the sizeable degree of failed change efforts, our paper endeavours to address this concern by: 1) stressing the significance of *context* (socially, organizationally, and within teams) for the consultant and consultation method in relation to any change intervention by introducing a new model to explain team effectiveness; and, 2) highlighting the importance of *consultant identity* within the change process by introducing enhancements to Kerber and Buono’s (2005/2010) model for “Complexity, Uncertainty and Approaches to Change.” To achieve these two overriding objectives, this paper will, firstly, discuss the importance of appreciating the perspective that change is predominately ‘social construction in flight.’ Secondly, given the speed of this social construction of change (i.e., our context), this article reviews and considers the influence of context on team effectiveness and presents a new model from which to view and enhance team effectiveness. Finally, delving even deeper, our research explores the implications of context for consultants, their identity, and the intervention methods they might consider, select, and initiate.

## THE SETTING: THE CHANGING CONTEXT

A great deal has been written about change management and the pursuit of organizational viability, profitability, and sustainability in times of unprecedented change. Historically, change models focused on the integration of structure, design, and performance with social and technical processes. Advancements pursued the Brobdingnagian task of realigning organizational cultures to better suit the environmental context. Implicit in earlier approaches is the assumption that the correct fit of techniques, behaviors, structures, processes, and expertise would bring about a desired behavioral response and enhance the feasibility and success of change efforts. Understandably, in the midst of contextual complexity and uncertainty, the organizational desire to re-stabilize in an innovative position (i.e., a new *status quo*) that promotes survival and allows further growth and development is generally at the forefront of change initiatives.

At the same time that enterprises are actively endeavoring to adapt, Cummings and Worley (2009) claimed that the pace of change appears to exceed human capacity to cope. Weisbord (2004) also indicated, “The world is changing too fast for [even the] experts” (p. 113). As the pace of change escalates, there is an increased risk that the importance of and dynamics within organizational context are underestimated. This should be avoided, since, regardless of whether one perceives change as linear, causal, or circular, *context trumps method*. That is to say, a sound change intervention method used in an unsuitable context will not likely result in a successful change effort.

The challenge of managing change is further complicated by the realization that *the very nature of change is changing*. It is now essential to understand that the alteration in the nature of change is occurring at and affecting all levels: individual, group, organizational, and societal. For instance, in some circumstances internal desires of an organization can motivate change, while at other times or even simultaneously, external factors might obligate firms to adjust to market demands. Temporal factors and “big ideas” can also stimulate change and trigger adaptive endeavours. For example, a new big idea can mean that it is no longer necessary to adhere to established explanations of change” (Senior & Swailes, 2010, p. 22) and can activate changes. Change is multidimensional, shaped and influenced by

environmental contexts that differ for each organization—no two scenarios are identical (Senior & Swailes, 2010).

With enhanced acknowledgment of the multidimensional complexity of change, insight into the dynamics of change is also undergoing continual refinement. Factors such as economic globalization and competition now impact change conceptualizations. Recognizing the importance of contextual forces, Pettigrew, Woodman, and Cameron (2001) suggested the change in our understanding of change is not only continuous (i.e., without equilibrium) but represents “reality in flight” (p. 698). Yet, “reality” is predominately socially constructed within most organizations and society, and, therefore, it is against the backdrop of change *as social construction in flight* that our research explores possible implications for OD today. In essence, not only is change changing, but, more importantly, our construction of what change is, is changing.

## **ORGANIZATION DEVELOPMENT’S RESPONSE TO CONTEXTUAL COMPLEXITY**

### **OD Intervention Typologies**

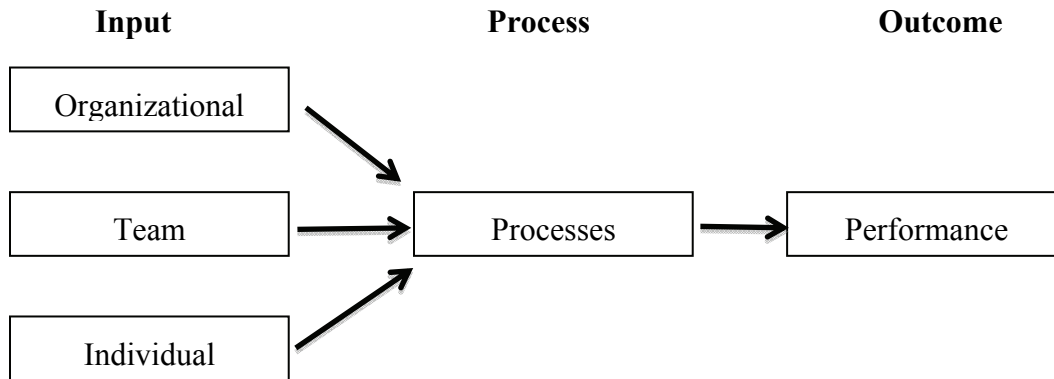
As the practice of OD responds to the escalating need for accurate appraisal of this contextual volatility, OD initiatives continually undertake progressive and refined enhancements. To provide a better understanding of what the field of OD endeavors to offer, Cummings and Worley (2009) organized mainstream OD interventions into four typologies: traditional *human process interventions* focus on social processes within organizations; *technostructural interventions* assimilate technology with organizational structure; *human resource management interventions* integrate people into organizations; and, *strategic change interventions* focus on achieving a competitive advantage. OD efforts are also enriched by the models of Ansoff and McDonnell (1990), Stacey (1996), and others that assess the varying degrees of environmental upheaval. These kinds of amalgamations of research align with Senior and Swailes’ (2010) assertion that strategic organizational analysis begins with evaluation of the strength of change forces (strong, moderate, and weak). Furthermore, contributions such as the development of Positive Organizational Scholarship (POS) by Cameron, Dutton, and Quinn (2003) and Appreciative Inquiry (AI) (Cooperrider & Srivastva, 1987) have also been recognized as philosophically beneficial applications in today’s turbulent times that can produce a “rich picture” (Bright, 2009, p. 6) for organizational direction. These notions and developments all point to the necessity for more than one approach or a combination of approaches to address the contextual complexity that affects modern organizations.

It is increasingly evident that context plays a significant role as a determinant for OD interventions, both in theory and in practice. Additionally, most, if not all, OD interventions occur within some form of a group or team of people, yet there is little discussion within the current models about the importance of context and its usage to explain team effectiveness. To address this deficiency, in the next section of this paper our research introduces an enhancement to previous models of team effectiveness that emphasizes the relationships between all contexts and the various components within the framework of team effectiveness.

### **Evolution of Team Effectiveness Models—Contextual Influences**

In the mid-20<sup>th</sup> century, McGrath (1964) developed the Input-Process-Output Framework for investigating team effectiveness (IPO Model, see Figure 1). This theoretical concept presents factors that enable or constrain interactions between individuals, teams, and the organization. McGrath determined that, amongst other factors/elements, individual characteristics, such as competencies and personality, impact team processes and performance outcomes by enabling or constraining interactions between individuals, teams, and the organization. Outcomes include quantitative and qualitative performance and affective responses.

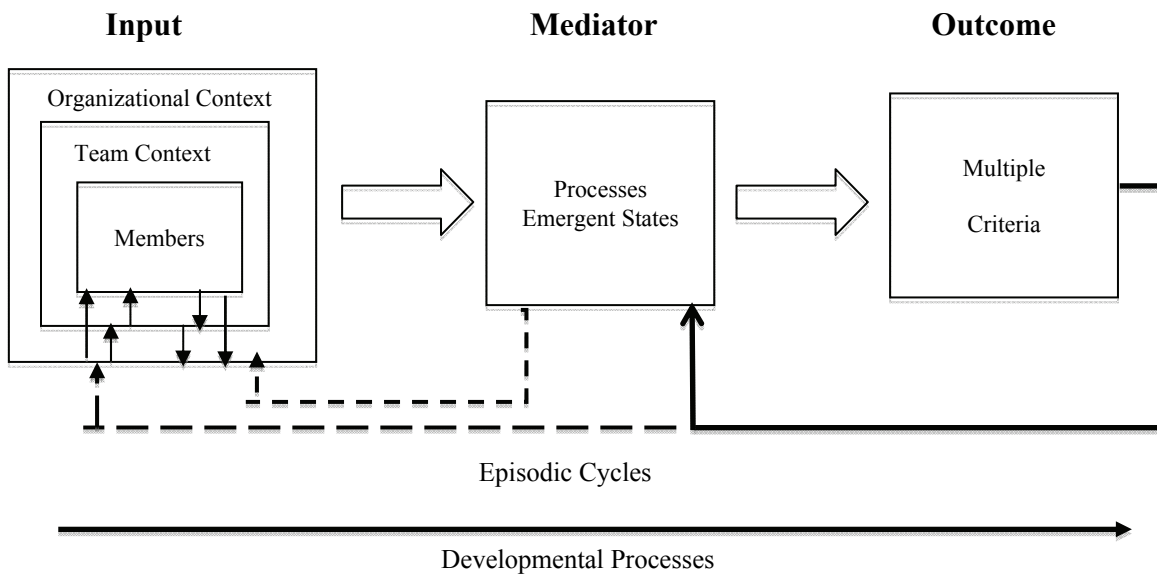
**FIGURE 1**  
**INPUT-PROCESS-OUTCOME (IPO) TEAM EFFECTIVENESS FRAMEWORK**



Source: Mathieu, J., Maynard, M. T., Rapp, T., & Gilson, L. (2008). Team effectiveness 1997-2007: A review of recent advancements and a glimpse into the future. *Journal of Management*, 34(3), p. 413.

Ilgén, Hollenbeck, Johnson and Jundt. (2005) further refined the IPO model by placing it into certain contextual and temporal environments. Elaborating on McGath’s seminal work, Ilgen and colleagues developed the Input-Mediator-Outcome Team Effectiveness Framework (IMO Model, see Figure 2) “to reflect the broader range of variables that are important mediational influences with explanatory power for explaining variables in team performance and viability” (p. 520). In the IMO model, individuals, groups, and the organization are shown as nesting with each other, interacting in a variety of give-and-

**FIGURE 2**  
**INPUT-MEDIATOR-OUTCOME (IMO) TEAM EFFECTIVENESS FRAMEWORK**



Source: Mathieu, J., Maynard, M. T., Rapp, T., & Gilson, L. (2008). Team effectiveness 1997-2007: A review of recent advancements and a glimpse into the future. *Journal of Management*, 34(3), p. 413.

take directions, and being affected by certain contextual factors, such as leadership practices and task design. Influence from the outer layers (solid lines) represents more powerful changes (i.e., hard changes) than in the opposite direction (soft, less potent changes signified by broken lines). Cognitive, motivational, and affective group traits and team processes are mediated by member actions. Qualitative developments are considered to be evidence of team maturity (Kozlowski, Gully, Nason, & Smith, 1999), and effectiveness (Mathieu, et al., 2008, p. 414). Feedback loops exist but are thought to occur only “as teams transition from *one episode to another* not within [the] episodes” themselves (Mathieu, et al., 2008, p. 414). Furthermore, the addition of an extra “I” in the I-M-O-I model acknowledges the cyclical causal impact of feedback and the non-linear or conditional nature of a continually adjusted outcome (Ilgen et al., 2005, p. 520).

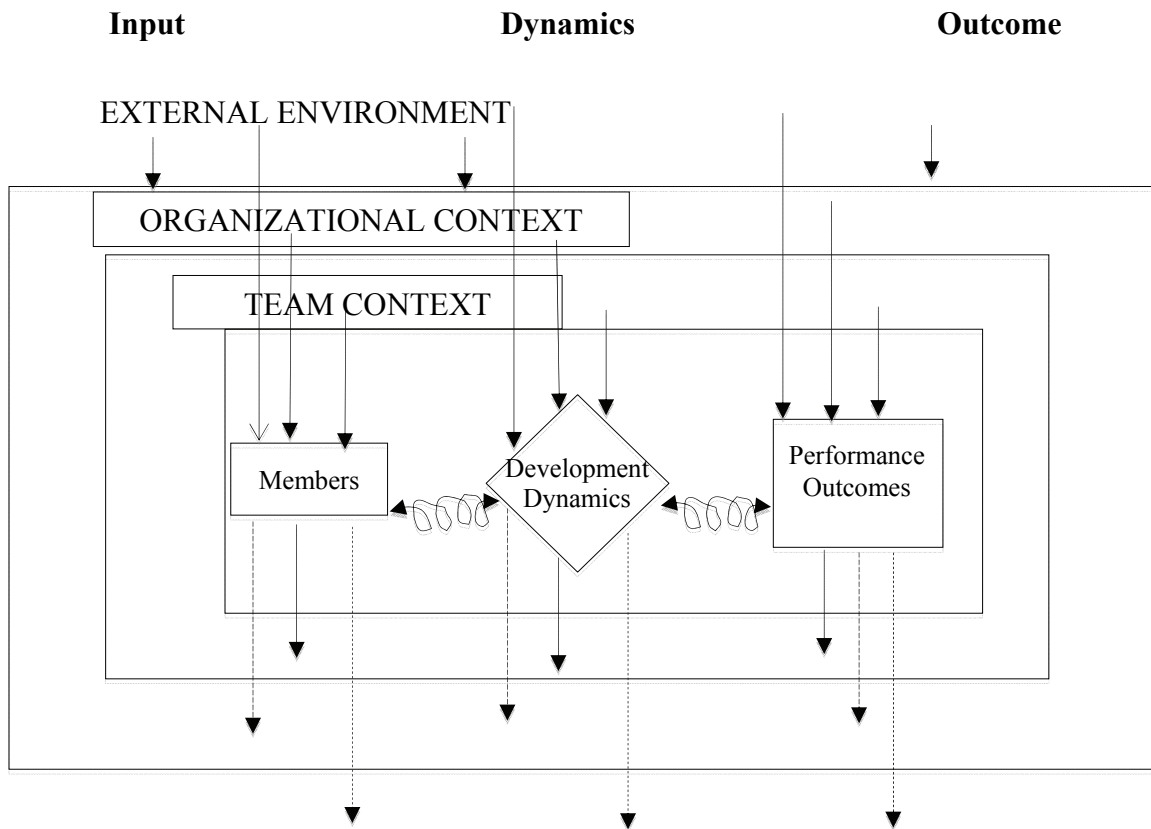
In this paper, we present a further enhancement to the IPO, IMO, and IMO models that acknowledges all contexts (external, organizational, team, and societal) and interactions relevant *throughout* the team effectiveness framework, and that consultants or consultant teams need to be aware of as they operate within team dimensions. The resultant Input-Dynamics-Outcome model (IDO model, see Figure 3) acknowledges the strong dynamic influence of all contexts on the organization, its teams, and its members; the members’ interaction with each other; and the performance outcomes. The nesting arrangement remains and indicates that team, organizational, and environmental contexts affect organizations, teams, and team members. These various influences between members and the environment are interactive and undergoing continuous adjustments and realignments with all the various aspects of context (Mathieu et al., 2008). Individual members are, thus, both influences and outcomes. Spirals indicate ongoing, constantly changing, dialectic discourses (and thus, dynamics) between members, contextual factors, and performance. Similar to the IMO model, directions of influence are multi-faceted and solid lines indicate the more powerful influences. However, a difference from the IMO model is the extent of the influence of context. Under this new model, context is shown as affecting all aspects of the process, including the performance outcomes of the team and, therefore, the organization. Context is also presented as a powerful mitigating factor in the nature of the dynamics of team development and what we perceive it (i.e., the context) to be.

Taking this model one step further, Whatley, (in press) demonstrated that

a group’s performance could be represented with the following equation:  $GP = f(X_1 + X_2 + \dots + X_n) \wedge \pm D$  — where GP = group performance; X = the individual’s skills, abilities, and behavior; n = number of group members; D = the dynamics of the group, as defined by McGrath, Arrow, and Berdahl (2000); and D is either  $> 1$  or  $< -1$ . This formula highlights two important truths of all groups: firstly, that the group’s performance is either greater than or less than, but never equal to, the sum of the performance of the individuals; and, secondly, the interaction between group members, or the dynamics of the group (D), has the largest impact on the overall performance of the group.” (p. 1)

Consequently, the dynamics of a group are either improving or harming the group’s overall performance. As stated previously, our constantly changing context now has even more influence than it has in the past, and is influencing organizations, and their teams, on a consistent basis. Thus, the implication is that a broader understanding of context and its relation to the dynamics of group level phenomena (Cronin, Weingart, & Todorova, 2011) is essential—at the individual (e.g., job design), team (various groups), and organizational levels. To date, the field of OD has predominately looked at context from the systems or organizational level and not at the other echelons presented in the IDO model. The new model, therefore, suggests that organizations and consultants need to engage in change intervention that adjusts to contextual influences. Consultants enhance their effectiveness when they develop an increased awareness of the ever-changing nature and role of the dynamic contextual interactions between and within all levels and aspects of the organization.

**FIGURE 3**  
**INPUT-DYNAMICS-OUTCOME (IDO) TEAM EFFECTIVENESS FRAMEWORK**



In the 1960s, Cartwright and Zander (1968) already recognized the evolutionary, multilevel nature of group dynamics, but since that time there has been limited expansion on these notions. More recently, though, the importance of group dynamics is receiving greater attention. For example, Cronin et al. (2011) purported that groups demonstrate dynamics features not only in terms of group characteristics and properties attributed to the group as an entity, but also regarding group processes (p. 573). This suggests that group dynamics encompass but are not limited to group processes.

In the IDO model, our revised exemplification of team effectiveness, we used the term ‘dynamics’ as opposed to ‘processes’ to reflect the recent work of Cronin and his colleagues. The work of other researchers (e.g., DeShon, Kozlowski, Schmidt, Milner, & Wiechmann, 2004; Kozlowski et al., 1999; Marks, Mathieu, & Zaccaro, 2001) also demonstrates that team dynamics relate to (but are not limited to) the processes that unfold in complex, “larger, systemic contexts of people, tasks, technologies, and settings” (Ilgen et al., 2005, p. 519). Additionally, McGrath, Arrow, and Berdahl’s (2000) normative advances also identified numerous causal interactions within teams. These insights all support our suggestion that the IPO model and subsequent enhancements, the IMO and IMO models, might describe real-life group behaviors even more accurately if these models gave more weight to the fluid interface between contextual and human dynamics and renamed it in the IDO model. The use of the term “dynamics” in the IDO model directs the focus of organizations and OD back to the multilevel, cumulative, and emergent constructs embedded within the systemic feedback loops of environmental, group, and member interactions (Cronin et al., 2011, p. 581). Thus, the integration of dynamics into our model for team effectiveness considers the “multilevel influence relationships ... [which] may be recursive: individual elements can affect group-level properties, and group-level properties can also affect

the individual elements” (p. 572). This premise is also supported by McGrath, Arrow, and Berdahl’s (2000) classification of the various dynamics in group activities: local dynamics, global dynamics, and contextual dynamics:

Local dynamics involve the activity of a group’s constituent elements: members engaged in tasks using tools and resources. Local dynamics give rise to group-level or global dynamics. Global dynamics involve the behavior of system-level variables—such as norms and status structures, group identity and group cohesiveness, leadership, conflict, and task performance effectiveness—that emerge from and subsequently shape and constrain local dynamics. Contextual dynamics refer to the impact of system-level parameters that affect the overall trajectory of global group dynamics over time, and whose values are determined in part by the group’s embedding context.”(p. 98)

Contextual dynamics emerge from the temporal interaction of embedded values (which are also part of the context) with local and global group dynamics. Thus, context lays the foundation for group interactions and influences team effectiveness.

An additional feature of the IDO model is that it highlights the importance of context, not just on input but on all the elements of the model. Furthermore, our model indicates that the power and potency of the context is far greater in one direction than another. That is, at all levels of groups and organizations, context affects groups more than groups affect context. Thus, context has a significant impact on all aspects of group activities. Acknowledging this backdrop—the importance of context on team effectiveness and OD interventions, it is also important to consider how these features exert a dynamic influence on consultant identity and the potential role of context in the effectiveness of an OD intervention.

## CONSULTANT IDENTITY

### Consulting or Consultation?

Before delving into consultant identity, it is necessary to delineate change agent responsibilities and clarify the role of consultation. Upholding Kurt Lewin’s conviction, Weisbord (2004) declared, “If you want to know the system you must first seek to change it” (p.77). Essentially, Lewin maintained, “not only could you solve the problem, you could simultaneously study your own process and thereby refine the theory and practice of change” (Weisbord, 2004, p. 77). This statement reflects Lewin’s extensive influence on modern management and marks the birth of *collaborative consultation* (Weisbord, 2004, p. 77; see also Shani, Mohrman, Pasmore, Stymne, & Adler, 2008). It also denotes a significant departure from the practices—not the intention—of Frederick Taylor and his notion of scientific management (Weisbord, 2004, pp. 27-73). Additionally, Lewin discussed the relationship between environmental context and individual behavior (Weisbord, 2004), a premise that continues to thrive at the forefront of mainstream OD research. A fitting definition of consultation is, therefore, consistent with the collaborative, environmentally interactive nature of OD as determined by its founding fathers. Jamieson and Armstrong (2010) proposed a definition that supports the aforementioned criteria and aligns with the writings of both Weisbord (2004) and McGregor (1960). Thus, for the purposes of this paper, and as itemized by Jamieson and Armstrong, consultation involves:

- working with a client in a relationship;
- not knowing the answers or even what you’ll do at the start;
- guiding and influencing the client’s work and decisions (as opposed to *doing* [emphasis added] the work);
- expertise being transferred and getting used with and through others;
- client learning, growing insight and capability; and
- continuous diagnosis and customized intervention content, methods and timing. (Jamieson & Armstrong, 2010, pp. 3-4)

These parameters for consultation point to the subtle, yet significant, difference between *doing* consulting and *being available for* consultation. *Doing* consulting entails consultant availability for hire as an extra pair of hands and places the consultant in the position of the expert with the answers. That role is quite different from *being available for* consultation. Tannenbaum and Eisen (2005) used the term ‘self-as-instrument’ to reflect “the importance of the *being* [emphasis added] [for] the practitioner in achieving effectiveness in the change process” (as cited in Seiling & Stavros, 2009, p. 2). Cheung-Judge (2001); Eisen (2010); and Jamieson, Auron, and Schechtman (2010) also determined that the *use of self* and *self as instrument* is vital to OD professionalism and effectiveness. Indeed, Seiling and Stavros (2009) determined that consultant *use of self* was so important that he declared that “[t]he only tool the consultant has in these [change process] interactions is ‘self’” (p. 2).

### **Context and Consultant Identity**

Research has established links between environmental context, group dynamics, and human behavior. However, discussions of behavior are generally limited to individuals and groups within the organization. For instance, Pratt and Ashforth (2003) determined that, in organizational settings, member identity plays a vital role in fostering meaningfulness and sensemaking. However, this application was not extended to the concept of consultant identity. The beginning of a linkage between context and the consultant’s role was, however, identified by Beer and Nohria (2000). Their empirical discussion of Theory E (the “hard” approach) programs demonstrated more traditional, directed change with the consultant taking on the role of an expert. The Theory O programs, which exemplified discovery and learning processes, ‘supposedly’ noted minimal involvement of the consultant. In Theory O programs, consultants “simply led a process of discovery and learning that was intended to change the corporate culture in a way that could not be foreseen at the onset” (p. 137). It is perplexing that the consultant role was minimized and discounted rather than given consideration as a factor that links to successful change dynamics. It is also interesting to note that in the combined Theory E/Theory O programs, Beer and Nohria determined consultants were ‘expert’ resources who ‘empowered’ employees (p. 141). Although not presented as such, this description suggests that a combination of consultant as ‘doing’ (i.e., expert) and consultant as ‘being’ brought about effective organizational change. Unfortunately, this research did not extend to further exploration of linkages between consultant identity and the varying consultant roles. Nor was the consultant role or identity directly connected to the success or failure of the various change programs. However, despite the lack of further quantitative or qualitative research, these observations nevertheless imply that a change in consultant roles and identity, based on the contextual setting, might enhance change efforts.

### **Consultant: Know Thyself**

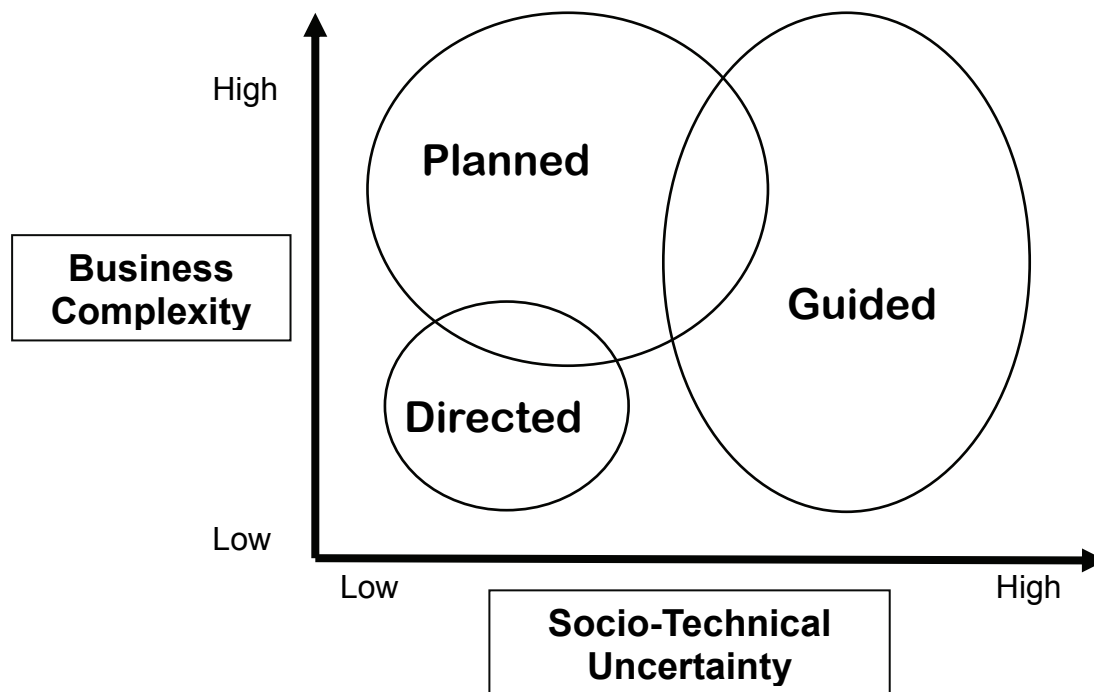
The fact that consultancy characteristics arise at all in the evaluation of change methodology suggests that consultant behavior and identity may play a significant role in the context and dynamics of effective change efforts. As previously stated, Weisbord (2004) asserted, “If you want to know the system you must first seek to change it” (p. 77). To this, Jamieson (1998) would add, if you want to change the system, you must first know yourself. Essentially, the consultant needs to ask the questions: Who is it that you ‘be’? What is in your invisible knapsack? What biases, perceptions, and experiences do you carry wherever you go? And, most importantly, as you interact with the world, are you teachable yourself, as Fry (1998) suggested, not to what you want to learn, but to what you need to learn? Are you available to learn from the system and modify your implementation as you go? Who is it that you ‘be’ and how is your ‘identity’ shaped by your personal projection? These are tough questions; however, all who desire to be effective consultants must engage in this process of self-reflection at some level. The ability to see self as object, self as subject, and be open to constructive feedback is essential. Vogelsang (2011) stated, “Our society has increasingly embraced the language of data and measurement at the expense of self-awareness” (p. 1). Koestenbaum (2009) asserted, “The greatest risk you will ever have to face is to lead an unexamined life, for, as we all know, [Socrates wrote,] ‘the unexamined life is not worth living’” (p. 588). *Nosce te ipsum—know thyself*—is an ancient proverb (Jensen, 2011) that delineates the dependency of consultant effectiveness on self-awareness.



### Context, Consultant Identity and Intervention Method Alignment

In their model, Complexity, Uncertainty and Approaches to Change (see Figure 4), Kerber and Buono (2005/2010) provided further insight into the complexity of change and change methodology. Their model described context as the functional interaction of two interactive mitigating factors: socio-technical uncertainty and business complexity. Kerber and Buono then ascribed three forms of change efforts resultant contextual interventions: directed, planned, and guided change. This typology is similar to that of Mitki, Shani, and Stjernerg (2000), who classified change efforts into three categories: limited change, planned change, and holistic change. Kerber and Buono also proposed that to obtain desirable results the varying nature of change requires customized approaches. For example, high levels of both business complexity and socio-technical uncertainty respond best to guided change. An example of guided change is the use of collaborative management research, while an example of planned change is an intervention that uses action research. In contrast to these scenarios, low levels of both business complexity and socio-technical uncertainty are more suited to directed change efforts in which the consultant provides the entire solution as the intervention.

**FIGURE 4**  
**COMPLEXITY, UNCERTAINTY AND APPROACHES TO CHANGE**

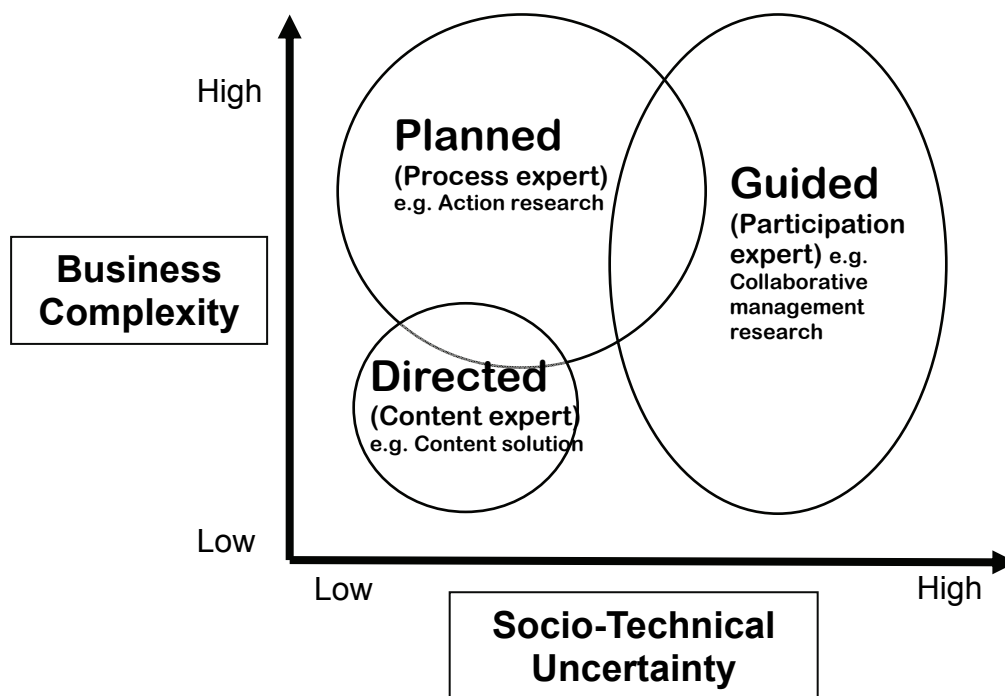


Source: Kerber, K. W., & Buono, A. F. (2005) Rethinking organizational change: Reframing the challenge of change management, *Organization Development Journal*, 23(3), p. 30.

At different times throughout the dynamic change process, organization members display varying degrees of learning, creativity, improvisation, resistance, reflection, and energy. Kerber and Buono (2005/2010) purported that as consultants move through directed, planned, and guided change with organizations, “significant competence [transfers are passed] from change strategists to change recipients” (p. 35). That is, the ability of change agents to select the most appropriate change approach depends on familiarity with corresponding advantages and constraints and identification of factors that moderate change capacity and urgency of the context. Like Beer and Nohria (2000), Kerber and Buono also sensed

a relationship between the consultant’s role and change approaches, but limited this association to a specified set of change process skills and knowledge. While there are undoubted benefits to these more objective, rationally-based proficiencies, the writers respectfully suggest that consultants who experience successful change endeavors may have captured and engaged in a more understated, yet remarkable aspect, of consultation. Thus, we propose that the building of organizational change capacity is more accurately reflected by the following extension to Kerber and Buono’s (2005/2010) model (see Figure 5). This overlay provides intriguing insight into the dynamic nature of the relationship between the context and the consultant’s identity, role, and planned intervention.

**FIGURE 5**  
**APPROACHES TO CHANGE: CONSULTANT USE OF SELF IN CHANGE COMPLEXITY**



When aligning consultant ‘self’ with context, a shift from the focus on consultant action (*doing*) is required. In other words, it is important that during change intervention the consultant *self as being-is* tailored to the specific, given organizational context. Directed change is suitable for contexts with low business complexity and low socio-technical uncertainty. These situations require more traditional change approaches in which the consultant ‘use of self’ presents as a ‘content expert’ with answers and a specific solution. In contrast, environments with increased complexity and socio-technical uncertainty respond more favorably to either a planned or guided approach to change as a change intervention typology. These types of interventions require the consultant to have a different form of ‘self’ (consultant identity), either as a process expert, as would be found within action research, or as a participation expert, as would be found in collaborative management research. Consequently, a consultant needs to be mindful of the three different kinds of ‘self’ (consultant identity). Kerber and Buono’s (2005/2010) model indicated that the relationship between context and change intervention typology is moderated by organizational capacity and urgency, to which we add that the change intervention typology in turn determines the appropriate use of consultant identity.

We use action research as an example of planned change under Kerber and Buono's (2005/2010) typology of change. Coghlan (2011) linked "practical knowledge" (p. 58) to action research, via Lonergan's (1971) dynamic cognitive structure model, which requires a dynamics interaction between knowledge, judgment, experience, and action. Coghlan (2011) also expressed action research, as a state of inquiry, as a way of 'being' and, therefore, it is a reflective 'inquiry in action' that uses self as an 'expert-in-process' instrument. Thus, in action research, action is 'being.'

Guided change also requires consultants to use 'self-as-instrument,' but in a further refined sense of 'being.' Here the focus on 'truth' is contextually dependent on the dynamic interpretations of the individual, the individual within groups, the individual within an organization, and the individual within society as influenced by experiences that have helped create perceptions. An example of this is collaborative management research, where collaboration (the state of being) is the core value and action is the dynamic emergent outcome. In this case, the consultant is purely a participant within the intervention dynamics and is neither a context or process expert.

In summary, in directed change the consultant's role is one of 'consulting' or 'doing' — as the content expert. In planned and guided change, the consultant's role is one of 'consultation' or various states of 'being.' There are no universal prescriptions when dealing with complex organization systems, and consultant 'use of self' needs to be dynamic and contextually sensitive. The implications are that consultants need to be prepared and able to move through all three phases (directed, guided, and planned change) as required by contextual factors. They also need to master the various consultant identities required for each type of change typology as reflected by the 'consultant identity continuum' (see Figure 6). This spectrum highlights the necessity of ensuring that consultants travel along the continuum as the context determines. Thus, by combining method typologies of socio-technical systems with consultant identities and intervention methods (e.g., content, action research, participation research) the consultant is able to interact with the dynamics of contextual demands and move effectively up and down the consultant identity continuum.

**FIGURE 6**  
**CONSULTANT IDENTIFY CONTINUUM**

	<b>Consultant</b> <i>"doing"</i> ←		→ <i>"being"</i> <b>Consultation</b>
<b>Context</b>	Low STS & Bus. Complexity	Mid STS & Bus. Complexity	High STS & Bus. Complexity
<b>Identity</b>	Agent of change	Facilitator of change	Participant of change
<b>Nature</b>	Content expert	Process expert	Collaboration expert
<b>Method</b>	Content solution	Action research	Collaborative management research

**Consultant as "Being"**

Values shape individual purpose and meaning. Jamieson and Gellerman (2006) stressed the importance of assuring value alignment between client and consultant. Because "values can have different priorities, at different times, under different conditions," this involves complexity beyond a set of stated values (Jamieson & Gellerman; 2006, p. 2). Palmer (1997) and Kouzes and Posner (2003) believed individual identity and integrity are essential for leadership. The extent to which a consultant or leader is capable of transcending family, workplaces, organizations, and greater society relates directly to the extent of one's willingness to work on oneself. Thus, as consultants, leaders or otherwise, acknowledgement of skills and social constructs brought by individuals to any situation is critical. Additionally, to function as organizational stewards and custodians, a primary requirement of consultants is the desire and intention to serve.

But, how does one get to know one's own identity? For the writers, understanding a private philosophy of life and business is essential. Confirming this, Jamieson (personal communication, June 24,

2011) recommended that ‘want to be’ consultants develop three areas of identity: philosophical stance, authority platform, and role/style variation. Authority platform entails possessing an awareness of the mindset a consultant brings to the engagement, knowing one’s specialty areas, and recognizing personal knowledge limitations. Role and style may be influenced by client needs and how one wishes to position one’s practice. This new focus, ensuring consultant awareness of individual identity, is consistent with Lundberg’s (2010) assertion that change consultancy requires a refocus on conceptual frameworks that “make sense out of managers and consultants mak[ing] sense of organizational change” (p. 210). This is possible only to the extent that consultants are teachable and willing to question private assumptions. It magnifies the importance of Jamieson’s earlier assertions that stress the consultant as ‘being,’ not as ‘doing,’ to which we would add that consultants need to modify and adjust who they are as the context warrants, and that a deeper understanding of self is now an essential skill for a sound consultant.

As a result, consultant ‘use of self’ can entail ‘being’ a consultant or ‘doing’ consulting. Doing consulting would imply being an extra pair of hands for hire. However, given today’s complicated contextual considerations, the complexity of organizational systems, and the pace of accelerated change, it may be that the task will simply become too large. Perhaps the day of individual consulting is nearing an end. Alternatives would involve team consulting and ‘being’ a consultant. ‘Being’ presupposes the existence and development of self-awareness. Coleman (2009) suggested a deep sense of being, an unconscious awareness, develops with “a perpetual state of reflection” (p. 25). Reflection involves recognition and acknowledgement of emotions, intuition, thoughts, strengths and vulnerability, integrity, appreciation, and learning. Who we are, what we carry in our knapsack, and that our state of being always precedes action. Appropriate ‘use of self’ leads to complementary corresponding actions—listening, perceiving, learning, understanding, knowing, and relating. In turn, these actions, these ‘doings,’ enhance our ‘being,’ but only if that process is allowed to happen. When a consultant is in the proper state of being, cognitive, behavioral and affective responses are more in tune with the context and individuals of organizational systems. The internal reality of a consultant, the self-awareness, the ‘being,’ determines consultant effectiveness, as determined by congruence between appropriate use of ‘self’ and context.

## CONCLUSIONS AND IMPLICATIONS

### Contextual Complexity, Change and Team Effectiveness

Change is “a complex [dynamic] responsive process” (Higgs & Rowland, 2010, p. 370) contingent on contextual demands. As the world experiences ongoing, unprecedented, accelerating change, the resultant instability challenges even the experts. Until recently, Lewin’s (1947) three-phase model of change (unfreezing, moving/changing, refreezing) had withstood the test of time. However, while the model appears steadfast, definitions within the model may need to be revisited. Unfreezing is often an environmental imposition in today’s volatile global economy. Moving or changing has taken on a new nature in that it is not a one-time occurrence in anticipation of, or response to, instability; it is, however, a state of constant (i. e., dynamic) adjustment and ongoing realignment. Moreover, today, refreezing is a limited reprieve and, perhaps, even, a bygone luxury. Alternately, refreezing may very well have taken on a new nature. The new ‘status quo,’ when attained, is not a state of permanence, but rather a state of dynamic, *permanent adjustments* to change. Nowadays, even the definition of stability has to be challenged, which is supported by Marshak and Grant (2008) when they distinguished new OD versus old OD on the basis of differing philosophical perspectives derived from individual ontological and epistemological assumptions. The importance of the significantly increased role of contextual influences and ongoing dynamic interactions cannot be underestimated and, thus, the IDO model provides a contribution to the field of OD on how context influences the dynamics of consultative efforts and many aspects of team effectiveness, the vehicle through which most of an organization’s change efforts occur.

### Contextual Complexity and Consultant Identity

A refocusing of the consulting role is required as consultants endeavor to help organizations respond and adapt to extraordinary change. We need a delicate, yet noteworthy, shift from just ‘doing’ consulting

to 'being' a consultant, and knowing when to apply either. This customizable capacity to tailor consultant interventions represents the reality that change is 'social construction in flight' and requires a fresh vision that acknowledges that the 'use of self' or consultant identity encompasses the dynamic role of 'self as instrument' in OD professionalism. This paper introduced a 'consultant identity continuum' which showcases that contextual circumstances (moderated by organizational capacity and urgency) determine the method/type of intervention, which, in turn, influences the appropriateness of consultant identity. Additionally, this paper highlights that the importance of understanding the dynamic nature of organizational life and the realization that consultant identity is only going to increase in importance.

### **Research Implications**

OD research has already clarified that performance outcomes are affected by context and related organizational dynamics. Worley (2002) suggested that the field of OD needs to develop a more in-depth understanding of the "intertwined nature of practitioner, practice, and theory" (p. 4). For example, Cameron, Dutton, and Quinn (2003) presented several studies that point to a positive correlation between social relationships within corporations and enhanced financial performance and link social context to desirable outputs. The IDO model introduced in this paper is the first team effectiveness model that reflects this relationship, the importance of context, and the ongoing dynamic interactions of these features within organizations.

OD research has also provided extensive qualitative and quantitative data regarding strategy and techno-structural models, as well as the integration of individuals within organizations, and at the multiple levels of organizational associations between individuals and groups, and environmental context. However, to date, there is little research about the consultant 'use of self' in relation to these organizations and their increasingly complex and dynamic contexts. To bridge the gap between normative and descriptive theories regarding consultation, this topic needs considerably more attention from both theorists and practitioners.

OD still needs to demonstrate within a theoretical framework the full extent of how context dynamically influences *all* variables within a change effort, including the role of consultant. At the very least, the role of consultant identity and the implications for change methodologies in light of the context, warrant further exploration. Given the unprecedented, perpetually accelerating, and volatile nature of change in the postmodern business environment, it is more critical than ever before that context and the resultant dynamics of various contextual interactions be given significantly more research consideration.

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