Gestalt in the Boardroom

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This paper describes how a Gestalt approach to working with corporate boards as "intimate systems" can greatly improve relationships and enable directors to operate with greater authenticity and clarity. The methods used are described and related to a case study of working with one particular board in a context where there were many misunderstandings and "off-target" decisions.

I N GENERAL TERMS CORPORATE BOARDS are thought of by many people as privileged groups of insular, self-serving people who bring status and "weight" rather than wisdom to corporate governance. In some instances this is true, in others it is more a case of ignorance and inadequacy in building relationships that causes the sense of remoteness from reality.

A board of directors is a particular kind of intimate system (Melnick and Nevis, 1999; Zinker, 1994) where the members are bounded by a common purpose and where achievement of this purpose relies on good contact and effective relationships. Boards are usually made up of internal executive directors and external nonexecutive directors. They are all elected by and are responsible to the shareholders. Often the directors are themselves shareholders either through direct investment and/or lucrative share option schemes. The executive directors usually have a specific responsibility for some aspect of the organization, while the nonexecutive directors have a more overriding corporate governance role. The varying roles and responsibilities make for an intimate and complex set of relationships.

The nature of intimate systems demands that people in a system relate to each other at levels that enable that system to function effectively. In practice what seems to happen is that boards of directors tend

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to operate in ways that seek to minimize ineffectiveness. Relationships are often tenuous, superficial, and even dishonest. There are quite often transitory subsystems of people who support each other out of personal interest. The best that most boards achieve, often through share option schemes, is to align the self-interest of individual directors with the interests of shareholders.

This approach tends to create a short-term share price focus that is nearly always to the detriment of the long-term sustainable growth and well-being of the business.

Our work with enlightened boards of directors, that is, those that realize the importance of good relationships, is aimed at addressing the way that relationships are focused on and developed so that individuals and the system as a whole can benefit from some or all of the following:

- Improved relationships leading to more enjoyable and more effective contact
- Less conflict and easier resolution when conflict arises
- Clearer, more honest and open communications leading to less misunderstandings
- An ability to face confrontation with more confidence and in a more relaxed way
- The creation of a more supportive environment for everyone
- Speedier decision making
- A more supportive way of challenging each other
- Reduced fear of speaking up
- A greater acceptance of difference
- More willingness to own mistakes and misjudgments
- More open and emergent agendas focusing on important issues of the moment
- More freedom of expression and authenticity, both individually and as a system
- A clearer focus on the needs of all the stakeholders as well as shareholders

In the Beginning

Our contract with the board we are working with stops short of offering individual and/or group therapy. Managing this boundary often becomes an important part of our work, especially since much of our work has a therapeutic impact.

The process of our work with a board of directors usually covers six areas. The way in which we introduce these six topics varies depending

on the needs of the particular system that we are working with. The six areas are

• Relationships in intimate systems
• Relationships in the context of the field
• The importance of 'what is happening in the moment'
• All round awareness
• Meaningful contact
• Working with boundaries

When I first describe our work to prospective clients as working with "intimate systems," they react with a mixture of surprise and distaste. I believe their surprise reflects their notion of the board being "intimate." To most senior executives the word *intimate* has a connotation far removed from the boardroom. Their scepticism and cynicism are welcome and accepted as real reactions to something that is very different and, for many, quite scary. This acceptance is in itself surprising to many.

Relationships in Intimate Systems

Relationships, particularly those within an intimate system, are mostly a matter of achieving a creative balance between

1) Knowing that what I am prepared to offer to others is what they want
2) Knowing that what I want is what others are prepared to offer me

Finding a creative balance is extremely difficult if people are unclear about what they want and what they are prepared to offer. It is a great help if the need for balance is made explicit and discussed openly. Looking at relationships in the boardroom in this way is usually new and, for many, quite off-putting. The very idea of working together to create the relationships that people want contradicts the traditional practice of avoiding anything other than the most superficial contact.

Working with a particular group of directors, the board of Reward Engineering,[1] we invited them to explore their relationships with each other so that they might become aware of how they both evoke and provoke reactions from each other. Working in pairs

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[1] The name has been changed to protect confidentiality. We were invited to work with this board because they were spending time and effort correcting the effects of misunderstandings and off-target decisions.

we invited them to talk about their experiences so far working with us and for the listener to notice what is evoked and/or provoked in them and to share it with the speaker.

They found this a difficult exercise because they were being asked to do something that they would never normally do.

When reviewing the exercise the directors concerned were surprised at what they were hearing back from the person they were talking to. The conclusion and learning was about their complete lack of conscious awareness about what was happening during the dialogue.

This simple exercise had the effect of highlighting for the directors how little awareness they had about what was happening and how they created barriers to the development of their relationships.

It seems quite banal to say that the simple formation of a board of directors assumes a level of contact and relationship that in reality just doesn't exist. In fact in many cases the board of directors is a group of individuals coming together to attend to an agenda, all of whom do so from their own perspective and with their own personal agendas and self-interest at the forefront of their minds.

Relationships in the Context of the Field

Bearing in mind the above discussion, of the nature of a board of directors as an intimate system, we believe it is important to work with the board to increase awareness of the field (Parlett, 1991) in which they operate together. Our approach is to look at the individual ground and then to work with the systemic ground.

The directors of Reward Engineering were by this stage intrigued by their work with us and willing to explore further. We invited them to reflect on their own prejudices and preferences that come to the fore when they are in relationship with others and to make a list.

We then asked them to choose someone else with whom they will share their list and to discuss to what extent their prejudices and preferences influence the way that they relate to others.

Once again the main outcome was a sense of surprise that such long-held beliefs can have such an influence on current behavior and that simply by listing them and talking to someone about them they were able to realize the extent to which this happens.

Two of the outcomes that we notice come from this form of sharing exercise is the way that quality of contact increases and people relate with a greater degree of authenticity.

As we move our focus to the systemic ground, we discuss with the board the way that the different contexts in which they live and work call for different forms and levels of relating and that all relationship work is context sensitive (Parlett, 1991). We introduce them to the idea that it is when contexts or field conditions are changing that the ability to tolerate difference (Bentley and Clayton, 1988) in others is a great help in building good long-lasting relationships. We suggest to them that there is a tendency to use our knowledge of ourselves and our personal values and beliefs as a barometer of what is right and wrong in the world. When we do this and we notice significant difference in other people, we have an urge to disagree and see their view as wrong and our own view as right, rather than to accept that they are just different. Intolerance to difference leads to being dogmatic and bigoted, whereas intolerance to conformity leads to disharmony and fragmentation.

We often invite the board we are working with to consider the polarity of conformity (wanting to be the same) and differentiation (wanting to be different). We ask them to imagine that people will be positioned all along the continuum from one extreme to the other. We suggest that if we have a sense of our own position or tendency toward one extreme or the other, it helps us to understand our own diversity tolerance.

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CONFORMITY   DIFFERENTIATION

For many directors the idea is that if they have a tendency toward conformity it is likely that they will want to fit in with others and they want others to fit in with them (i.e., they have a low diversity tolerance). And if they have a tendency toward differentiation, they enjoy their own and other people's differences and so have a high diversity tolerance, which often comes as quite a discovery.

We usually invite them to explore the thought that what might be most helpful is if they could move along the continuum to meet the needs of every situation in which they find themselves and to have an appropriate level of tolerance for diversity or of positions on any given topic. This is particularly true of situations such as mergers and takeovers.

The Importance of "What is Happening in the Moment"

As our work continues we start to explore with the directors the way that much of their attention seems to be directed to "historic reality" (i.e., documented or spoken perceptions of the past) and/or "predictive

reality" (i.e., forecasts, plans, and fantasies of the future), rather than "current reality" (i.e., what is happening right now). This is not surprising since most of the information they receive is either historic accounting information or futuristic business plans and very little about what is going on now.

Historic reality is little more than one or more perceptions on what has already happened. There is nothing anyone can do to change this, other than to argue about the precise meaning of events and their outcomes. There may be some learning to do from this looking backwards, but since what happened must have happened in the circumstances that prevailed then rather than now, the learning is minimal.

Predictive reality can be seen as a fantasy that conjures up some vision of the future that almost certainly will not happen. Long-range planning has proven to be of little real value and has in some instances taken organizations in a direction counter to that which current information would indicate to be appropriate. Perhaps the issue here is more about having a clear purpose and intention about the direction of the business and then to relate current information to how this can best be achieved.

Current reality is all about adaptability and responding to what is happening right now. It means focusing on current information rather than past events or predictions of future events. When this happens, awareness grows and people and the organization are able to react quickly to get the best out of the current situation.

> The directors of Reward Engineering were discussing how they had been getting on together since our last session. Gordon was speaking when Eric the CEO cut across him with his own comment. I stopped the discussion and asked them what had just happened. Gordon was annoyed and Eric was unaware while Peter was embarrassed.
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> I told them what I had noticed, and I asked each person to share how they were feeling. They did and much to everyone's apparent surprise, they discovered that this is something that Eric constantly did and that everyone often felt just as they did now. Eric was the most impacted by this process, and he wanted to know why they had never said anything before. This was the first time in over 12 years that they had stopped and explored what was going on in the moment.

This is particularly true of relationships within the board when what has happened in the past can interfere with current relationships. If people are able to focus on how they are feeling in the moment, then contact with each other tends to be more real and more effective.

All-round Awareness

Gradually, the directors we are working with develop a growing awareness of how they relate to each other and how this is more conditioned by themselves than by the other person. It can be a major discovery for people to realize that the reactions of others are often evoked or provoked by how they themselves are reacting to the other. This growing recognition of the importance of self-awareness informs much of the work that we do.

Moving From a One-Way Mirror to a Two-Way Mirror

We introduce the directors to the idea of mirroring or reflecting to another person how they are currently reacting to them. We describe this as a process whereby as the relationship develops, the other person's interest in us needs to match our interest in them. And that one way to ensure that this two-way interaction grows is to let the other person know about what happens for us when we are in dialogue with them.

   We practice this by working in pairs and inviting the listener to simply share what is taking place by reporting what is happening when they meet the other person. They do this using three phrases to start their comments:

- I am noticing.
- I am imagining/wondering/thinking.
- I am feeling.

At first people find that using these phrases makes their interactions seem clumsy, but with patience they discover a way of including them in their dialogue so that the other person feels noticed and becomes aware of their interest in them. This both extends and deepens their developing relationship.

   I did this exercise with the directors of Reward Engineering and Eric reported afterwards.

      "I thought when you suggested this exercise that it was stupid. In fact the first two rounds I ignored your instructions and just intervened the way I normally would. Then Peter worked with me and he used just these three statements. I was amazed at what happened. It was if I was truly being listened to and heard for the first time in my life. Peter seemed to be really interested in ME, not just what I was saying.

      "Then in the next round I stuck to the three statements as I worked with Gordon, and it was as if I could really see him and hear

him and more importantly understand what was going on for him. The words I heard painted pictures in my mind, I could feel and experience and relate to what he was saying. And now I want to understand what happened."

It is quite a change for many directors to start to operate from an awareness of what is going on around them. For most corporate leaders the primary level of awareness is the intellectual and analytical. Moving from this sole position to one where they are more aware of inner feelings and external environmental happenings is strange to say the least.

The idea of appropriate self-disclosure (Jourard, 1971) is one that directors initially imagine is about revealing personal information about themselves. When they realize that it is possible to share what they are thinking, imagining, and feeling when they are in contact with others, it changes their sense of making real contact.

According to Schumacher (1978), human beings, in their pursuit of self-awareness, confront four questions:

1.   What is really going on in my own inner world?
2.   What is going on in the inner world of other beings?
3.   What do I look like in the eyes of other beings?
4.   What do I actually observe in the world around me?

"AWARENESS is the full use of your sense organs; your eyes, your ears, your taste buds, your nose and your skin.

"AWARENESS is a process that happens in your total field of perception.

"AWARENESS unlike introspection, is non-controlling, non-correcting, non-interfering, *it just is*" (Rosner, 1987, p. 28).

We find it helpful to explain to directors that in Gestalt we deal with three zones of awareness (Oldham, Key, and Starak, 1978):

1.   **Outer zone:** Which is where we make contact with our outer world through the use of all our senses. This includes our awareness of our environment and other people.
2.   **Middle zone:** This zone includes all our thinking processes and what we imagine and fantasize about.
3.   **Inner zone:** The inner zone is where we feel and experience our emotions and bodily sensations.

It then makes sense that the statements, "I am noticing," "I am imagining," "I am feeling," relate to these three zones. By paying attention to all three zones,we can heighten our own awareness so that we become

a highly attuned instrument, assessing what is going on and for using this knowledge to help us build the relationships we want.

Meaningful Contact

The level of contact within most boardrooms is superficial, and directors see little reason to change this. There may be some individual contact at a deeper level, but as a rule the board as a whole maintains a "minimalist" approach to contact. When contact increases in the boardroom, the work of the board both within and outside the boardroom is more enjoyable and more effective.

> At the beginning of my third session with the directors of Reward Engineering, they reported that they had noticed how their respect for each other had increased. It seemed that as they were more able to say to each other what was going on for them, they had started to really listen to each other and their understanding and respect had increased. This in turn had led to some important decisions being taken more quickly, and they believed more effectively than they might have done.
> They were also enjoying spending more time together.

The directors we are working with come to realize that all contact takes place within some particular context,and when the context changes, so does the level of contact. This means that the previous contact achieved with a person cannot be assumed to be the same in the new context.

The most common manifestation of this is when business contact in the organizational setting changes into a social context. The contact will not be the same, and the boundary levels have to be renegotiated and established at a level appropriate for the new context. This is frequently misunderstood and leads to many difficult and sometimes embarrassing situations.

We are all different, and we move with more or less confidence from one context to the next. As our willingness to meet at our boundaries has a lot to do with our self-esteem and confidence and as our self-esteem and confidence change from one context to the next, our boundaries change accordingly. An example of this that most people can relate to is the difference between home and work environments. Though of course there are some people for whom the context in which they operate does not seem to affect their approach.

Our clients like the idea of individuals having layers, just like an onion (Rosner, 1987), and it helps them to understand the way that they protect themselves and reveal only that which they feel safe to reveal. I

describe how peeling our onion means moving inward from the outer layer to the inner more real "who we are" layers. We share the following diagram with them to indicate the layers as seen in Gestalt (Clarkson and Mackewn, 1973), and we then give a brief outline of each:
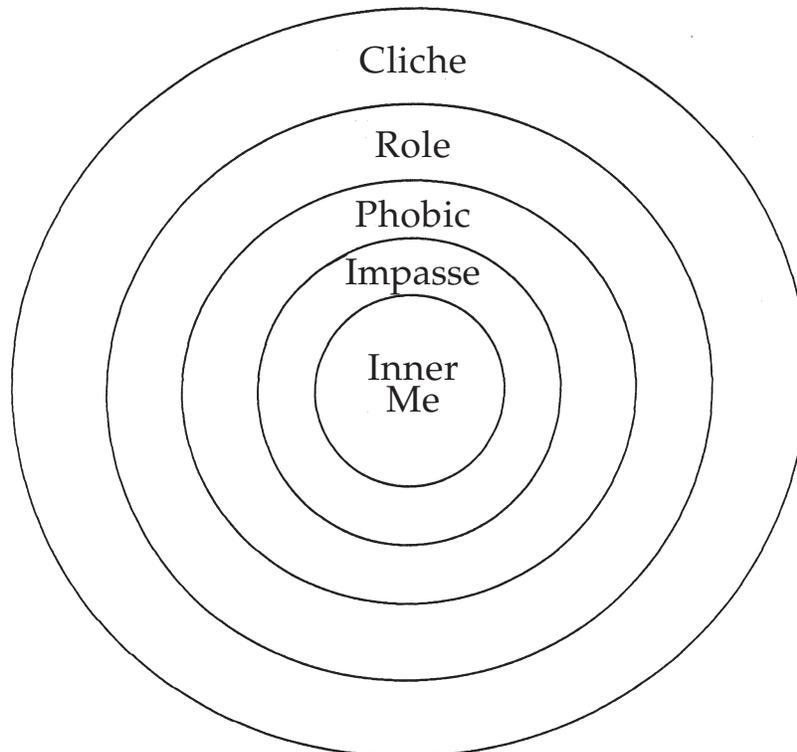
1. **Cliché layer:** This is where we, on the "normal social level" talk about the weather, about arrangements for the cocktail party we are attending, about how we dress, and so on. "Cocktail talk."
2. **Role layer:** Here, we talk about our job, our connections, and our importance in our world, be it company executive, consultant, housewife, or carpenter. We identify with our job (role) and meet the world in that capacity.
3. **Phobic layer:** This is the layer where we encounter the obstacles that, until now, we have avoided. In Gestalt it is called the phobic layer because it is here that our defense mechanisms work at their best.
4. **Impasse:** In Gestalt the impasse is where we are "stuck"; we don't know where to go and don't know what to do. The impasse is

knowing where we are and anticipating the blessings or horrors of our future journey while lingering in what we know. The very process of staying with rather than bursting through leads to discovery about ourselves in relation to the world. There is much learning from increasing our awareness of the nature of our stuckness.

5. **Inner me:** In the center are our true selves and all our feelings. In social life we cannot deal with or express these feelings freely. We therefore learn through our upbringing, school, home, and so on how to express our basic feelings through the layers. We make creative adjustments to our social life. Some adjustments will be "healthier" for us than others, and if we want to change, we often need a guide, coach, or therapist to facilitate the change.

Following lunch we returned to our meeting, and the directors of Reward Engineering decided that they wanted to explore the way that they "peeled" their onion in different situations.

They asked me what I had noticed working with them, and I shared how I had just noticed over lunch how they had moved up to the cliché level and how when we were working together they were mostly in the role layer with visits into the phobic layer. I also shared that this was different for each of them, though there was a tendency for them all to find the same level.

The discussion continued about how peeling the onion depended on circumstances and who was present and how confident we feel. What became clear was that if each of us is aware of how we are making contact and at what level, then we can operate with choice rather than reacting out of habit.

Directors begin to understand that how they choose to peel their onion is a paramount aspect of self-awareness and comes before they are able to develop awareness of others.

Working with Boundaries

Perhaps the most difficult part of our work with directors is in the area of boundary management. It seems that there is an unwillingness to accept that the major difficulties of building good relationships stems from within. When we start looking at how people interrupt and block their awareness and respond to others in ways that are ineffective, there is much scepticism. When we further suggest that this may be caused by many years of conditioning by the messages that they have been fed and have swallowed whole, the skepticism increases.

When I relate this to the working environment, they can see how this process continues with the message of, "This is how we do things

round here." When we react and respond in a conditioned way, we are no longer paying attention to our zones of awareness. We are instead on autopilot. These introjected messages do not always serve us well, though there are moments when they do (e.g., when the fire alarm sounds).

We explain that working to understand our introjections starts with identifying them and then going on to notice how they impact on our awareness of and reactions to others.

We also find it very useful to work with our clients on their projections that sometimes fill the boardroom to overflowing. I start by sharing this definition with them.

> A projection is a trait, attitude, feeling or bit of behaviour which actually belongs to your own personality, but is not experienced as such; instead, it is attributed to objects or persons in the environment and then experienced as directed toward you by them instead of the other way round [Perls, Hefferline, and Goodman, 1951, p. 211].

In other words, to project is to place outside of ourselves what we do not want to acknowledge ownership of. Usually this is something we don't like about ourselves. Often we can associate what we don't like in others with what we don't like in ourselves.

In order for our clients to understand their own projections we work through a four-stage exercise:

1. Identify what you don't like in yourself.
2. Share this with someone else using the statement, "What I don't like about myself is. . . ."
3. Now imagine seeing this in someone else and notice what you feel and how you react.
4. Imagine again seeing what you don't like about yourself in someone else and this time imagine that you feel and react differently. In other words break your own pattern.

The way through this impasse is to take *ownership* by working on our projections, following the four stages above and also by being careful about our language. Usually when we use terms such as *one, you, they* when we mean *I,* we are projecting or disowning our feelings.

> On completion of this exercise with the directors of Reward Engineering, I asked them what this experience had been like for them.
>   Peter shared how he was often put off by Eric's dominant and arrogant behavior. He said that he felt that, when he went in to

Eric's office, it was as if Eric were rolling a great big heavy black rock at him, and he felt he would be flattened. Eric interrupted and said, "But don't you realize it is only a polystyrene ball painted black?"

We took this example and discussed how Peter's fear of his own dominant and arrogant behavior was being projected onto Eric and that what Peter was feeling was as a result of his own projection rather than Eric's reaction.

Having looked at some of the ways, perhaps the most readily understood ones, that people block themselves, we can start to look at boundaries. We invite our clients to do this at four levels:

- Personal (the self)
- Interpersonal (the other)
- Social (ethics, morals, manners, etc)
- Systemic (environmental)

1. **Personal (the self):** Through knowing ourselves we can learn to know others.
   The inner self is what we know about ourselves, what we like and dislike and where we choose to set our boundaries of comfort and protection.
   The outer self is what we reveal of ourselves to others.
   Establishing our personal boundaries somewhere between the inner and outer self is important in the way that we are able to make contact with other people. It is partly an issue of safety (self-protection) and taking risks (discovering others and being discovered). In establishing our own boundaries we learn about what is important to us, and we can from this position recognize that the people we are meeting are doing the same as we are in setting their own boundaries. The fact that we may well set boundaries that are different to other people means we have to be sensitive and careful as we approach making contact with people. We will not succeed if we assume that their boundaries are similar to ours.

2. **Interpersonal (the other):** Through knowing others we learn about ourselves.
   When we meet and make the first moves to discover the other person, we will encounter our joint boundaries. These boundaries of protection and risk have been formulated and conditioned by our life's experiences and have become enshrined in our assumptions, prejudices, and preferences. The same is true of the other person.

Perhaps the most risky aspect of making contact with other people is to temporarily suspend our judgmental voice and to check out our assumptions. This is much easier to say than to do.

3. **Social (ethics, morals, manners, etc.):** People expect that social boundaries will be observed.

When we first meet people, there is a general expectation that what we each believe to be social boundaries will be respected. The fact that these differ in different societies can lead to much confusion. When what we expect does not happen, the first response is one of being offended. This is mainly because our boundaries (what we expect) have been invaded, either accidentally or deliberately. Once again it is important to check out what we and the other people are likely to expect, in other words, to try to establish where our respective boundaries are.

4. **Systemic (environmental):** Systems establish through time and practice what is OK and what is not OK (Bentley, 1996).

In the process of building good long-term relationships, we face the need to recognize both the systemic boundaries within which we operate and the systemic boundaries in which the other operates. These are primarily organizational boundaries and secondarily the wider environmental boundaries. These are usually physical, such as dress codes, boardrooms, and office layouts, as well as psychological and behavioral. Recognizing and working at these boundaries rather than clashing with them is important in setting the scene for the developing relationship.

At this point in our work we emphasize how the concept of contact is very important in building relationships. Having previously done some work on contact, we now describe contact as meeting at our boundaries. We provide the following diagrams in order to depict what we mean by "meeting at our boundaries" and achieving successful contact.
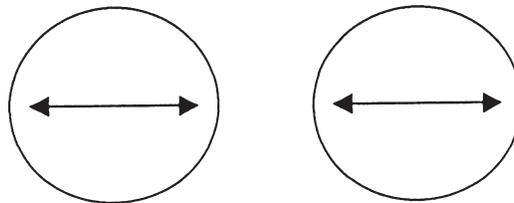
NON – MEETING

In non-meeting both people are not prepared, for whatever reason, to take the risk of approaching closer to the other. There is a process of moving forward and backing off which both people are doing. Most

business meetings are in fact non-meetings where people avoid real contact and constantly move forward and back off.
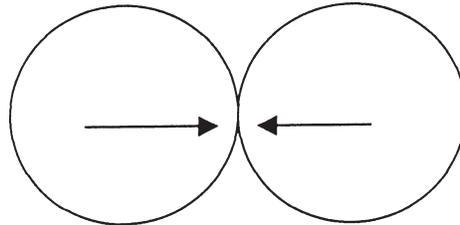
CONTACT

In contact both people are willing to take the risk of reaching the other's boundary. This helps when each gives the other signals that they want to be in contact or "inviting them to meet at my boundary."

The point of contact is the place where people really meet and where it becomes safe to share more about your inner self and to discover more about the other person.
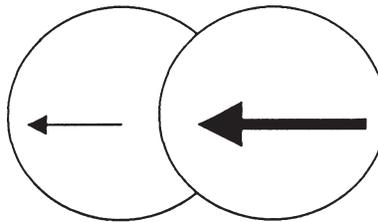
INVASION

When one person forces through or over another person's boundary, the person whose boundary has been forced feels invaded. This can happen accidentally through the insensitivity of one person to the other or deliberately when one person "attacks" the other. The reaction on the part of the invaded person is to avoid and/or escape contact with the invading person.

At this point in my work with the directors of Reward Engineering I referred back to the example of Peter feeling invaded by Eric's rock and how, even though it was a projection of Peter, the sense of invasion was no less real and Peter backed off and avoided making contact with Eric.

The key learning here is that we can only make contact at our boundary with others and that we choose where this is OK for us while at the same time others are doing the same.

Discovering the Payoff

At some point in our work with boards of directors, we are nearly always challenged about where the payoff is. Our reaction is usually to spend some time looking at the expected and/or anticipated payoffs that people want and to work through a number of ways in which these might be achieved. We will frequently invite people to select the payoff closest to their hearts and to take on the responsibility for seeing that this gets addressed during the rest of our work together.

Taking responsibility for getting what you want becomes a theme from this point on, and we work with this idea in the exercises we do together.

The real payoffs come from experimenting with what is being learned, and we encourage our clients to experiment at every opportunity and to notice what happens. The whole idea of the experiment is to discover what happens, rather than to get it right.

> Toward the end of my work with the directors of Reward Engineering, they started to discuss how the work we had been doing could be done with their management team. This led to their talking about how beneficial it had been for them and how the payoff would increase if managers were able to relate in the same open, trusting way that they were doing.
>
> I asked them what they thought the payoff would be and they were immediately able to suggest four:
>
> • less misunderstandings and mistakes
> • better, more informed decision making
> • more willingness to make contact and less conflict
> • improved quality and better response to customers
>
> They readily agreed when I suggested that these might be the benefits they were noticing in their own work together.

Another significant element in the discomfort that people feel is the way that well-established boundaries between them are shifting as their relationships develop. The directors of Reward Engineering have been working together for 12 years and are now experimenting with shifting what appeared to them to be immovable boundaries.

The Need for Support

As a final part of our work, *we* suggest that our clients consider the ways that they can support their changing, more open interactions with others. We start this by asking them how they currently support themselves and get support from others. We further suggest that we can usefully discuss support by using images/metaphors of ourselves showing how we support ourselves, for example a bridge supported by banks. We can also draw a support network showing ourselves at the center and lines flowing to and from those whom we support and receive support from.

We also suggest that it is important to check the level of support available from the system in which they work. When they have established what is and is not supportive, it is possible then to find ways in which they can create the conditions that help them to work at their authentic best. We suggest that they use each other for this as much as they can.

Moving Beyond

As we come to the end of our work together, we spend time clearing up any unfinished business both with us and with each other, and we then turn our attention to what has been satisfying and will be taken forward.

When we have reached a point where our clients have recognized and declared their satisfaction and when we have also declared our satisfaction at our work together, we leave them to continue developing their relationships for their own and the organization's growth and well-being.

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