

Playing with Contextual Complexity: Relational Consultation with Family Businesses

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Over the course of 10 months in the late 1970s, two important figures in the field of family counseling, Luigi Boscolo and Gianfranco Cecchin (the Milan Associates), worked with Irving Borwick (a corporate director at ITT) and Bruce Reed (from the Grubb Institute in London) to investigate the applicability of Milan systemic family counseling concepts and techniques to business organizations. The group concluded that there was no simple translation between the worlds of family counseling and organizational consulting; they considered their work with management teams unsuccessful and they disbanded (Borwick, 1986). Borwick came away from his collaboration with the Milan Associates with the realization that families and business organizations are significantly different systems, and that counselors "who enter into business organizations must begin to develop new maps and new roles" (p. 439).

Therapeutic consultation with families and organizational consultation with businesses are each complex processes requiring different sets of expertise and experience. What then are family counselors to do when they are consulting with a system that is simultaneously a family and a business? Along with a variety of other "helpers,"

family counselors are providing an increasing amount of consultation for family businesses (Robichaux, 1990). But do we have the necessary maps and the necessary tools to responsibly offer assistance? This chapter charts a way of thinking about and working with these systems that aims at respecting the integrity of both family and business and the complexity of the relationship between them. It presents a model for understanding the sorts of confusions and concerns that arise when family and business become knotted in emotionally distressing and/or financially troubling ways, and it suggests some ideas for how to help with the process of untangling. It begins with a brief discussion of the place of family businesses in the American economy, proceeds with a brief philosophical justification for taking a relational stance to understanding, and then uses this discussion to begin the process of constructing a relational approach to family-business consultation.

Family Businesses

Contrary to the stereotype, family businesses are not just small "mom and pop" operations. Not only have familial relationships become much more varied, with daughters and wives taking positions of responsibility that only a few years ago were strictly the domain of fathers and sons, but the market share of the American corporate pie that family businesses enjoy is truly staggering. Following Rosenblatt, de Mik, Anderson, and Johnson (1985), if we define a family business as "any business in which majority ownership or control lies within a single family and in which two or more family members are or at some time were directly involved in the business" (p. 4), then it is possible to assert that more than 90% of America's million businesses are family controlled, accounting for approximately 40% of the gross national product (GNP; Galagan, 1990).

In the last 5 years, more attention than usual has been directed toward family business (Dyer, 1986; Jaffee, 1990; Rosenblatt et al., 1985). For the first time, large numbers of family-business founders simultaneously face retirement, and succession issues take on great importance for the economic future of the companies and the economy to which they contribute. The roots of the present-day situation can be traced back to post-World War II, when an influx of returning GIs started their own businesses. Presently, as these founders prepare for retirement, their enterprises face extinction unless a smooth transition can be made from first generation to second.

An example of a difficult transition involves a father who, on paper, has turned over the business to his daughter, but wishes to remain involved in the day-to-day operations. If not delicately handled, this type of situation can quickly devolve into a leadership tug of war; in the wake of such a struggle, the daughter might choose to leave the company entirely. Such succession issues, although not the focus of this chapter, highlight an important point: If it is true, as Borwick (1986) claimed, that businesses and families are very different sorts of organizations, then it is equally true that family businesses are not a simple amalgamation of the two. Business relationships are different by virtue of being among family members, and family relationships must somehow accommodate business-related issues.

Thinking and Working Relationally

Family counselors, particularly those influenced by the cybernetic ideas of Bateson (1972), have long contended that an individual's problems are best understood in the context of his or her family relationships (e.g., Haley, 1963; Palazzoli, Boscolo, Cecchin, & Prata, 1978; Watzlawick, Weakland, & Fisch, 1974). For example, a man may describe his feelings of depression in intrapsychic terms, but his psychophysiological experience and the way he understands and "shows" it is part of a communicational web of relationships that he participates in creating and maintaining. Thus, it makes good contextual sense to consider the man's symptoms in relation to the beliefs, attitudes, and responsive actions of his family members. It is in this sphere, in the relations between family members, that family counselors typically direct their suggestions for change. Rather than attempting to help the man personally explore the historical causes of his depression, a family counselor would play with ways in which the interactive patterns involving the man, his defined depression, and his family could in some way be altered.

The family-business consultative model offered here uses such contextual assumptions as a template for organizing a relational approach to working with clients. However, the approach is more directly influenced by Bateson's philosophical insights than by the idiosyncratic ways in which they have been adopted and adapted by particular family-counseling theorists and clinicians. Following Boscolo and Cecchin (Borwick, 1986), we believe that family-counseling models are too context specific to be directly applicable to other organizations. However, Bateson's ideas are abstract enough to be differentially adaptable to any system of relationships.

A more in-depth philosophical discussion of the therapeutic implications of Bateson's ideas, and their elucidation in terms of family-business consultation, have been offered elsewhere (Flemons, 1991; Flemons & Cole, 1992). Our intent here is focused on describing the particular way in which ideas about relationships can be used to organize a consultant's work with clients. Still, it is important to make brief mention of the philosophical justification for taking a relational stance.

There are two primary ways to support the contextual claim that meaning resides in relationship, both of which have to do with the business of knowing. The first concerns the nature of perception; the second concerns the nature of language. According to Bateson (1972, 1979), we perceive relationships not things: "In the world of ideas, it takes a *relationship*, either between two parts or between a part at time 1 and the same part at time 2 to activate some third component which we may call the *receiver*. What the receiver (e.g., a sensory end organ) responds to is a *difference* or a change" (1979, p. 106). Language, too, is relationally structured. Norris (1987) considered it "a cardinal precept of modern (structural) linguistics that signs don't have meaning in and of themselves, but by virtue of their occupying a distinctive place within the systematic network of contrasts and differences which make up any given language" (p. 15). Given that knowing and understanding are shaped by perception and language, it is clear that no known thing exists in isolation, and that meaning is contextually determined: "This" makes sense only in relation to "that."

The practical implications of such an understanding reverberate throughout the consultative process. The consultant's attention never settles on an isolated person, symptom, idea, problem, or solution, but constantly questions how each derived "piece" of information fits with or connects to others. The overarching question informing this process has to do with how family and business contexts are each separately and jointly defined and related.

The Relationship Between Family and Business

For the most part, theorists have conceptualized the sorts of problems that can arise in family businesses in terms of the incompatibility between family and business roles. Constructs such as "role conflict" (Salganicoff, 1990), "role carryover" (Rosenblatt et al., 1985), and "role confusion" (Freudenberger, Freedheim, & Kurtz, 1989) have been offered as means to explain what happens, for example, when a boss acts like a father or a father a boss. The notion

of role allows one to describe the different relationship demands of a family and a business from the perspective of each of the individual participants. A father (a role that is defined in relation to the role of child) is generally expected to act differently than a boss (a role defined in relation to an employee). When one role overlaps with another, contextual confusion can reign supreme. What is a controller to do when the CEO, her father, handles her criticisms of his decisions by telling her that she sounds too much like her mother? Is it possible for a son to ask advice from his father about his marital problems when he is in competition with his sister for vice president in charge of marketing? Will the father's empathy yield to worry about whether his son is capable of handling pressure?

Imagine a father and a son who, as partners in a business venture, are unable to agree on an important contract. Their stalemate might be traceable to what could be interpreted as a clash of roles—a partner who cannot stop being a father when he is trying to convince his associate to change his mind, or a son who cannot stop being a partner with his father during weekend get-togethers. How is a business partner to react when his associate acts like (and is, in fact) his father? If he responds as a son, he undermines his position as co-author of their business fate; if he responds as a colleague, he risks insulting his father and ignoring his filial responsibilities. Similarly, how is a father to react when his son uses Sunday dinner to demonstrate, in front of the extended family, his brash independence and lack of respect? If, as a father, he admonishes the son's impertinence in front of everyone, he risks embarrassing him and further entrenching the cocky attitude that has been so predominant at work; if he responds simply as a business partner, the father publicly relinquishes his position as respected patriarch of the family.

The role dilemmas each man faces make clear how difficult, indeed impossible, it is for family business members to follow simplistic, albeit well-intentioned formulas for improving relations. It would not be uncommon for a consultant confronted with such a scenario to counsel the father and son to each strive to keep their family and business roles clearly distinct. But such advice reveals two mistaken premises about relational phenomena. First, it assumes that roles are somehow formed within the individual, rather than constituted in relationship to the verbally and nonverbally communicated stance(s) of the other person(s) in the interaction. Second, it assumes that such relational phenomena are indeed separable. Each premise is discussed next, and the consultative implications of a different understanding are outlined.

Mistaken Premise 1: Roles Exist with Individuals

Roles can be considered shorthand descriptions of interactions because they define positions taken in complementary relationships. A child needs a parent to be a child; to be a boss, one needs employees. To help in not losing such a relational understanding of clients' roles, a consultant would do well to attend primarily to the interactions to which roles refer, the patterns of behavior that characterize the family context, the patterns that exemplify the business context, and the patterns that emerge as a function of the family-business interface.

Such an orientation brings forth a number of interesting context-sensitive ideas to explore. In reference to the father-son relationship described previously, one might ask some of the following questions: Are there aspects of the men's familial tie that are important to preserve in their business discussions? Is the son trying too hard not to be his father's son, thereby impelling dad to "put him in his place?" Where do they have their business meetings? Are the two of them relating at work as they did when the son was growing up? If so, is it helpful? If not, why not? Who pays for lunch? What do they call each other at work? What would happen if the two men purposefully set out to discuss the contract issue twice over, once on the same long walk in the botanical gardens they used to take together when the son was a youngster and again in the boardroom, complete with white shirts and first names? With such an orientation to consultation, one searches for ways in which the contextual complexity of family-business relationships can serve as a resource for, rather than an impediment to, a resolution of their stalemate.

Different contexts, such as a family and a business, can be distinguished in terms of the set of relational rules or expectations of which they are composed. Contextual rules can be understood as redundant patterns of interaction between individuals, as "agreements" or "formulas" that "prescribe and limit . . . individuals' behaviors over a wide variety of *content* areas, organizing their interaction into a reasonably stable system" (Jackson, 1965, p. 9). Certain interactions are expected, and certain interactions are not expected. Rules and expectations change when contexts change, even if the individuals involved are the same in each case.

The confusions and misunderstandings usually described as accompanying role overlap can thus be explained in terms of what happens when expectations do not change from one context to the next. For illustration, consider the case of a husband and wife whose marriage and joint business are in jeopardy. Some years before, when their two children were young, the wife had begun selling diet

and beauty products out of their home. Her husband, who had not wanted her working at all, put up with "this little hobby of hers" because it "wasn't a real job" and he could "keep tabs on her." But the wife was effective in sales and a hard worker; before too long she had other women working for her and, over time, she established a significant distribution network for the products. To her husband's chagrin, she began making more money than he. He took a deep breath, quit his job, and joined his wife in her growing enterprise. The marriage had been organized patriarchally—the husband had the final word on most issues. However, the business was started and developed by the wife, and, although she spoke of her husband as a partner, it was clear that he was at best an equal on her terms, despite his best efforts to have it otherwise. Needless to say, there was much contextual confusion where family and business overlapped because many of the implicit rules and expectations—such as how decisions were to be made and who was to make them—in each context contradicted those in the other. The couple fought incessantly over issues, such as the selling of their house, that had implications for both the family and the business.

Again, a consultant who misconstrues roles as individually defined characteristics would probably suggest that the husband and wife keep their family and business roles clear and distinct. This would be an excellent suggestion if it were possible to do. However, as with all good advice, it is much easier said than done. To understand why this is the case, it is helpful to move to a discussion of the second mistaken premise.

Mistaken Premise 2: Relational Phenomena Are Separable

If, as Bateson proposed, the informational world of perception and language we inhabit is relationally structured, then any attempted marking of a distinction (e.g., asserting and striving to ensure that one's "father role" does *not* contaminate one's "boss role") is a relational act. That is, separations connect. A good example of such relational understanding can be found in Bowen's (1985) insight that forcibly and angrily cutting off contact with one's parents and siblings is not an effective means of emotionally divorcing from them. The attempted separation forges a connection, even across physical distance: "The person who runs away from home is as emotionally attached as the one who stays at home. . . . He runs away kidding himself that he is achieving 'independence'" (p. 535). Similarly, people's most concerted attempts to eradicate some despised aspect of themselves, such as a smoking or drinking habit, unwanted thoughts or dreams, eating too much, panic attacks, and

so on, can sometimes have the paradoxical effect of tying them that much tighter to that from which they wish to separate (Flemons, 1991). In the realm of human communication, where issues of selfhood, marriage, and social and business relationships are necessarily managed, there is no such thing as pure separation.¹ Any boundary that successfully distinguishes "A" from "B" simultaneously ensures that each is defined in relation to the other. Thus, to bring the discussion back to the topic at hand, all anxious attempts to sever family and business roles will necessarily fail to do so. This can cause problems, but it can also suggest solutions. The challenge for consultants becomes not how to get clients to separate this role from that, but how to help them discover and invent the ways in which the relationship between the contexts they participate in can be both separated and connected in interesting and creative ways.

For example, if the inescapable association and dissociation of contexts is applied to the marriage/business difficulties discussed previously, several ideas emerge for establishing a helpful consultative orientation. The couple may think of their marriage as one in which the husband is the head, but their relationship in the business challenges that easy assumption. If he has already exhibited the strength and flexibility necessary to appreciate his wife's ability to create a business opportunity for both of them, in what other areas of their marriage has he discovered and shown similar qualities? How can he use his patriarchal proclivities to help him demand that his wife develop her independent spirit in both the business and the family? How can the wife independently find ways to access her husband's experience and ideas? How can they keep family and business separate in ways that enhance their interdependence?

Each question asked previously can help move the consultant and family in the direction of discovering resources—resources that can be mined from either family or business context and applied as is or in some transformed fashion to the same or the other context.² The following case example illustrates this approach.

Consulting with a Family Business

A woman in her late 40s asked for advice in handling problems with her 70-year-old mother over a jointly run dry cleaning business.

¹Actually, this is not quite true. Entropy, or the scattering of pattern, is the one kind of separation that is not also a connection. See Flemons (1991).

²This has some obvious associations with the "solution-focused" work of de Shazer (1982, 1985) and O'Hanlon and Weiner-Davis (1989).

The daughter, who wanted to discuss the situation without her mother present, complained that her mother (a) did not give her enough responsibility, (b) treated her like a child, (c) and left their job descriptions undefined.

When the consultant explored positive interactions between mother and daughter outside of the business, the daughter identified several things. The most striking of these was their shared belief that women must put themselves and their families first. The consultant then asked questions such as the following to determine how this could be used as a resource in the business.

1. How much do you and your mother agree on the need for a woman to put herself and her family first?
2. How does that translate into your working relationship?
3. How flexible is your working interaction with your mother regarding personal time for sick leave, vacation time, and child care?
4. When does this flexibility and understanding of a mother-daughter relationship work for you in the business?

These questions helped the woman connect the positive interactions of flexibility inside and outside the business. By doing so, she moved toward realizing that undefined or flexible job responsibilities (one of her original complaints) allowed her the freedom of missing work for family and personal time. Once home and work could be connected in such a way that one did not simply undermine the other, the daughter was able to begin building a more positive working relationship with her mother.

This example illustrates some of the benefits of thinking relationally, of accounting for the necessary connections between family and business, and using them to help alter stuck interactions. Such a perspective allows for great flexibility of response to the various conundrums faced by family-business clients.

A relational approach to consultation can perhaps be described best by offering some of the questions that can be used to organize the consultant's work with his or her clients. These are not questions that would be asked directly of the clients, but rather of oneself, to shape the direction and nature of the consulting process:

- What are the rules of interaction in the family?
- What are the rules of interaction in the business?
- In what ways are family and business kept separate? How helpful are these separations? In what ways do attempted separations create unintended connections? For example, are brother's attempts to "just be the boss" at work making his sister

all the more aware that he is "just her little brother?" Who monitors and maintains the boundaries (between family and business)?

- In what new ways can the two contexts be separated? (A common tact taken is for family members to call each other by their given names at work: has this or other similar ideas been tried?)
- In what ways are family and business kept connected? How helpful are these connections? In what ways do attempted connections create unintended separations? For instance, is husband pushing his wife away when he talks shop on the weekends? Who stirs family issues into the business, and vice versa?
- In what ways should difficulties at work be understood as having nothing to do with family issues, and vice versa? Despite this, can the necessary connections between the two contexts be used as a resource to help resolve a difficulty in one or the other? That is, in what ways can successful interactions at work be utilized at home, and vice versa?

Summary

Members of family businesses are rather like any specialized group of individuals: They tend to trust those who have had similar experience. For those of us who belong to family-business enterprises, credibility is more easily won; for those of us who do not come with that particular passkey in hand, we would do well to follow Borwick's (1986) advice: to acquaint ourselves with "the territory of the business world" (p. 439), whether through research, or training and education opportunities. This, coupled with a consultation map such as the one outlined here, can provide a grounded, flexible orientation to a most fascinating and complex world of family-business relationships.

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