The Client I Only Met Once:
A Three-Year Organizational Role Analysis Over the Telephone

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Introduction

Like many -- if not most -- of my consulting colleagues, I am working with clients more and more over the telephone. This is largely due to the advent of executive coaching and the increasingly complicated nature of peoples' professional and personal lives. These phone sessions supplement face to face work and generally take place when clients are traveling or are otherwise too busy. While work can be accomplished, it is still considered a compromise. In a sense, it is a 'holding action' until the consultant and client can meet again.

For three years, in contrast this norm, I have been conducting an organizational role consultation by phone with a client I have only met once. This meeting took place over a year after we had begun our work. Before then, despite my suggestions that we work face to face, my client would not make herself available to do so. Citing too little time, too much distance, or too much work, she communicated to me strongly that she preferred working by phone.

Since this was an unprecedented professional experience, I sought out ways to better understand this case in particular and the possibilities of doing consultancy over the phone in general. This paper is a study of the specific dynamics, restrictions and advantages of work by telephone that may also occur when one does a combination of face to face and phone work with a client. My working hypothesis is that working exclusively by phone does change the way we work, how we undertake our interventions, and how we develop an understanding of our clients and our professional selves.

I will briefly summarize the consultation by describing my client and the course of our work. In the next two sections (Hypotheses About My Client; Intervention Strategies), I ask: " What does this preference to work by phone tell me about my client and how does that insight guide me in working with her?". I conclude with reflections on the professional challenges and limitations of this work.

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Summary of the Consultation

My client, Leslie, was referred to me in November 1999 by a colleague who encountered her in a management workshop and felt ill-equipped to help her. She was described as a very intense, ambitious, and rather cold person with serious difficulties relating to her co-workers. At age 42, with a medical degree and a Ph.D. from a prestigious Ivy League university, she was actively and desperately seeking help for her career. Her goal was to become senior VP of the global corporation she had been working for since 1996.

From our very first phone contact, Leslie expressed an urgency to begin working immediately and had no desire to meet me in person. As she had been referred to me by a colleague who had already been working with her and as she was living in Boston (and I in New York), I assumed that we would soon schedule at least a few direct meetings, so I agreed to begin. In the first year, our one-hour work sessions took place approximately once a week; in the last two, they took place less regularly. To date, we have had 84 sessions (44 in 2000, 30 in 2001, 7 in 2002, 3 in 2003).

While we referred to this work as executive coaching, I have always conceived of it as organizational role consultation. This methodology is an individually structured process that provides a sophisticated assessment of current role dilemmas, a better understanding of the roles of significant others, greater clarity regarding one's exercise of authority and leadership, and systemic awareness. The goal is to develop more creative and effective strategies for managing oneself in role and to experiment in areas of behavior and performance that are untested new territory. As Lawrence (1979, p. 243) states, "the starting-point is the individual in his or her roles in relation to the systems in which he or she lives and works".

When we began, Leslie had a very under-developed idea of role and largely saw every interaction as a personal one. She lacked a basic understanding of the role relationship between superior and subordinate and the important function of containment in the management role. She would inevitably personalize all workplace interactions. Frequently referring to her family's advice and influence, her primary focus has been her intense feelings about her work situation, her colleagues and superiors and a desire to get ahead.

Since we began our work, Leslie has changed jobs three times, each time moving up the hierarchy impressively. When we began, she had a sales support position and traveled every week to the Mid-West. She was extremely unhappy with this

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position and desperate to get out of that job, feeling it was beneath her. No matter how hard she worked, she consistently felt under appreciated. After receiving a negative rating from her superior, which surprised and upset her, she soon found a new position in the company as medical advisor to two marketing groups and was relocated to New York City's corporate headquarters.

Despite her evident success in this new role, she experienced tremendous anxieties. She expressed continual doubts about herself and had difficulty holding onto successes as well as coping with inevitable disappointments. After eight months in the position, a letter critical of her working style and inability to work as part of a team signed by her peers was secretly circulated. When she found out, she immediately found a new position as medical director of the organization's top selling product, which she identified as "the highest medical position in the organization".

In addition to her impressive credentials, Leslie is blessed with many abilities. She has excellent organizational skills, particularly in bringing order out of chaos (she often complains that she has to clean up the messes of her predecessors), and is a superb presenter. She is highly verbal and extremely bright.

What is first and foremost to Leslie is being seen as the best, particularly by those in charge. All her activities and anxieties are associated with how she is perceived by her superiors. She holds herself to extremely high standards of performance and behavior and always tries to leave a good impression. "I have to behave a certain way in order to succeed….I am trying to avoid anything that is negative". Even when she is praised (which is often) that validation is short lived and temporary. "If I don't get positive feedback all the time, I am exhausted and tired."

On a daily basis, she works very long hours, getting up at 3 or 4 in the morning and working late into the evening. She often works weekends. She flies back and forth from Boston (home) to New York (office) almost every weekend. While she frequently complains about the amount of work, she feels she must respond to all demands and is uncomfortable and anxious if she is not continually busy. Leslie's pattern of "killing herself" is connected to her fantasy that she will be well rewarded.

Leslie frequently expresses disappointment with her superiors. She often copes with these hurts by denigrating them and inflating herself. Her view of subordinates is that they are either incompetent, unwilling to take direction, or lazy. She expresses contempt for peers, who are often a major threat to her ("It is so critical to constantly perform and outdo everybody else"). A peer who gets recognition instead of her can consume her energy, i.e. "Because they make you equivalent, my natural instinct is to crush him. I just want to get rid of him". Concerned about always appearing self controlled, however, Leslie fears that she will be "found out" or

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punished for the negative and angry feelings she harbors. "I really have to behave. I have to control myself from really blowing up."

Leslie feels that exhibiting extremely nice behaviors will somehow compensate for her contemptuous attitude and will 'coat' the negative with the positive. "I have to mold myself into a pretzel and be sweet and nice". In fact, however, she has little faith in the positive. Even when a positive event has just occurred (highly praised presentation, corner office, bonus) she buries the news in our session. She can often find a negative 'spin' on even the most positive event, "They said the presentation was inspiring, but I'm concerned about envy". Hers is a black and white world, where she must be constantly vigilant and on her guard. She cannot relax, even if something good occurs. Often a positive event is followed by expressions of extreme concern about the future. She is always looking for another job.

It is not difficult to imagine why others do not like her. She has made it clear that she hates being around "mediocre people", i.e. "It's insulting being around Alan. I don't want to be associated with him publicly…I rarely interface with people who are simple". She often criticizes her peers to her superiors and is disappointed when they take no action and surprised when her peers distance themselves. Her explanation is that they are threatened by her intellect. "My competence makes me more scary to other people". And yet she recognizes that she is part of the problem: "My tone can be very frightening to deal with. I can be condescending. If I met someone like myself, I would be intimidated by me".

Leslie feels isolated "not interfacing with people more similar". She often expresses her loneliness: "No one is your friend. I feel alone in this big company". She is extremely sensitive to being excluded, and when that occurs, she copes by denigrating: "Others are simple. Maybe that's why I don't fit in".

My client brings her family of origin into every aspect of her organizational role. She constantly discusses her work situation with family members and seeks their advice. Her various elaborate explanations for the behavior of others seem often to find their source in family members (particularly her father and husband), who support her by stating that others are envious or out to get her (i.e. "He's trying to make you look bad…She's malignant. She will try to use anyone to her own advantage…They are egging you on".) Denigration of others appears to be the most highly evolved and acceptable family defense against feelings of need, dependency, and vulnerability.

What does this preference to work by phone tell me about my client?

I believe that in many ways working over the phone provides Leslie with a sense of safety and control. First and foremost, there is the actual physical separation. Leslie is someone who keeps her relationships at a distance in the workplace and the phone

serves the same function for this consultation. As psychoanalyst Linda Larkin (2000, p. 3) writes, this medium affords "the distance and sense of control…to manage her fears of being in a relationship".

Of course one of the major drawbacks of working by phone is that the "visual clues of each participant are missing such as gesture, posture, dress, grooming, eye contact etc. Even the fragrance of each participant is missing" (Manosevitz 2000, p. 6). At the most basic, because I cannot read her facial expressions or body language, working over the phone helps her to feel that she can manage my impressions of her more easily than the effort required to do so in the workplace, where she feels she must constantly "be on" and where "they watch everything you do and what you wear". This has helped me to understand why someone who so craves to be seen is so unwilling to be seen by me.

As previously noted, Leslie is highly critical of others as well as highly anxious about being criticized. Working by phone eliminates the possibility of criticism of her physical appearance and behavior. It helps her to be more disguised and anonymous, thus giving her a feeling of being less vulnerable.

Our one meeting took place a year after our work began at the client's initiative. She was concerned about the way she makes eye contact ("too intense") and how she generally relates to people in person. Despite her stated goal for the meeting, it was difficult for her to maintain eye contact and she was reluctant to address the topic. Not only was she a glamorous 'eyeful', she was quite formal and distant. Since then, she has made no further suggestions that we meet and has not responded to mine.

Leslie's control starts at the beginning of each work session, when she makes the phone call. Leslie does any manner of tasks (I often hear ice clinking) and even activities that directly compete (i.e., checking her e-mails) while we are working. This gives her the opportunity to act out her ambivalence to our work and retain the illusion that she is controlling my experience of her.

I believe that working by phone provides her with a certain freedom to use expressive, spontaneous language and to behave in ways she might not in person. As Sulkowicz (2000, p. 1) notes, it creates a "spirit of disinhibition". Thus I have access to a part of her that might not otherwise find expression in a face to face relationship. Assuming that she feels safer over the phone, I take it that she is offering me material that she otherwise keeps to herself and of which she is perhaps unaware. On balance, however, I would suggest that the dilution of our work resulting from the distance of the phone probably outweighs this potential benefit.

The use of the telephone makes it possible for Leslie to keep me and the consultation separate from her workplace and her family. As I am not

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'contaminated' by associations with others in those environments, the consultation and I can be maintained as 'good' objects. As Michael Civin (2000, p.196) writes:

> In the presence of abundant experience of persecutory anxiety, an individual might try to use splitting to attempt to preserve loving experience from contamination by hateful experience, to save love from the external environment from contamination by internal foulness or visa versa.

This need for splitting, however, is often accompanied by a "simultaneous desire for wholeness that contradicts the desire for security" (ibid., p.193). I believe that Leslie carries a similar tension, i.e. the desire for integration and the need to keep things separate for safety. I see this, for example, in the integration that seems to occur following my establishment of various boundaries during the course of our working relationship.

The answering machine has been an integral part of the consultation, as it provides reliable contact with me. Whenever she calls, she knows she will hear my voice – either live or on the machine. As Aronson (1996, p.164) observes:

> On the machine the therapist's voice was always present in a totally predictable way and the illusion of constant availability could be maintained. Speaking aloud to the machine was entirely under the patient's control…[It] allowed her to speak to me as if I were present and as if I were her omnipotent creation…Just as with a teddy bear, there was the illusion of the responsive object.

For Leslie, I believe there is a need for constant access. There have been times when she has called me directly after a difficult experience and has wanted to immediately book an appointment for that day. It has been my experience as an organizational consultant that many clients simply cannot commit to a regular schedule of appointments; sometimes there is a need for more flexible availability. Because we work by phone, Leslie and I have that flexibility.

One great asset of working over the phone is the stability and containment it provides. Were we to be holding regular face to face sessions, our busy work and travel schedules would force us to cancel or rearrange many of them. Despite our busy schedules, we are generally able to talk the same time each week. As Zalusky (1998, p.10) notes: "No matter where she was she could always maintain connectedness to an emotionally present person, even if I were in a distant city...[providing] an ever increasing sense of object constancy". For Leslie I believe this constancy is particularly important due to her feelings of visibility and vulnerability in the organizational environment. This is especially necessary when she is in the midst of unpredictable or socially demanding circumstances, such as at off-sites, conferences, or week-long sales meetings.

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Intervention Strategies

This consultation has challenged me to develop new ways of working. One major difficulty is that I am not on site and cannot observe how Leslie interacts with others, much less conduct interviews to assess how she is perceived by her subordinates, superiors and peers. Since our work is not sanctioned organizationally (she pays the fee), there is no opportunity to interface with her superiors and set goals in alignment with their priorities. Unable to collect this data and present it to her for her learning, I must rely on what others have written about her. Except through her perceptions, I don't really have a sense of the organizational culture and how my client's behavior contrasts or fits in with the norm (she is my only client from this organization.). I must rely on the information she shares about her organization, even as she acknowledges her limited understanding ("I don't get it politically").

Having limited access to organizational data is a persistent issue in role consultation, even when a consultant works on site. Often all one gets is the client's perspective, so the challenge is to understand the client's internalized organization or what Armstrong terms the "organization in the mind" (Armstrong, 1995). My essential hypothesis is that the organization in Leslie's mind is the unexplored and therefore unresolved ordeal of her childhood. She projects her chaotic internal world onto the organization, and whatever is projected out is then reintrojected. I believe Leslie's self criticism is projected onto her superiors, whose criticism she constantly fears, and onto colleagues and subordinates toward whom she expresses contempt. She is unable to assess and understand the behavior of others except in relationship to this internal world. Under these circumstances, it is understandable that concepts of role, role relationships and systemic issues would be extremely difficult to integrate.

Working by phone places new demands on the consultant and requires an "active and inquisitive stance" (Zalusky 1998, p. 7) in order to hear the nuances of thinking and associations. Without the countless physical clues of connection, I am more aware when my attention is straying. I must listen and listen carefully to her, and often reassure her (and myself) of my presence and the continuity of her experience in me by referring to something she has previously said or done. (I often refer to her original goals and strategies, as well as examples of success.)

Unable to rely on visual landmarks, both Leslie and I are more dependent on words. The tone of voice, the length of silences, the comparative amount of talk take on particular significance over the phone. Leslie is a very verbal and articulate person, which is good. For someone so highly verbal, working by phone is a natural vehicle. However she also uses language to fill up the space and control the interaction, which often leaves no space for thinking, reflection or spontaneity. For example, she begins each session with a ritualized summary of her current situation, which seems

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to be the verbal equivalent of the thoughts constantly going on in her head. While this helps her contain whatever anxiety she experiences at our initial contact, I have few possibilities for intervening other than to interrupt her. She cannot see the facial expression associated with my attempts to ask a question or make an observation. When I don't interrupt her and simply listen, I find myself quite depleted by the time she stops. Giving her feedback on this experience has helped her realize how her organizational colleagues may also feel.

This high attention to language provides an expanded window into the material Leslie presents. Her vocabulary is studded with words regarding how she is perceived. Not surprisingly, it is also replete with words and phrases expressing her denigration of others: e.g. "way too simple", "manipulative", "stupid", "abusive", "controlling", "inappropriate". From her language, I have developed a picture of her internal world as one which is under constant siege from a hostile and difficult external environment. On the one hand, she must always be on guard and on the other hand, infinitely flexible.

On a practical level, working by phone has some distinct advantages. Because I wear a head set when we work, I am able to write notes of our sessions using her exact words. Thus I have a verbal 'picture' of my client, which I would not otherwise have were we working face to face and I had to reconstruct each session afterwards. Because I am already taking notes on the PC during each session, I have been more disciplined and consistent in writing up my notes.

Leslie knows that I am writing while we work; I asked for her permission to do so in advance and told her it was for my own records. For the first 6 months, I sent her written notes of our sessions. I believe this gave her a sense of containment and also the reassurance that she was being listened to and understood. While she does pick up my language in the course of a session, she mostly needs to put her wishes and resolves into her own words. Leslie seems to find particular comfort in talking and in presenting her view of the situation. When she cannot continue, she often asks: "What can I say?", as if there must be words somewhere to describe her experiences. I often refer to her language in later sessions. Thus her own vocabulary and language serves as one method of providing continuity and demonstrating progress in this long-term working relationship.

We began the consultation with Leslie's goal of becoming a senior VP, which remains constant. Over time we have articulated a strategy to get there, which has been continually updated in writing. (My early suggestions that she consider other possible goals were not taken up by her; I think part of the way she contains herself emotionally is to hold onto a steady and dependable -- though perhaps unrealistic -- goal.) Often she becomes doubtful about her inevitable success and concerned about her present circumstances. In these situations, I refer to the original strategy and note what she has accomplished toward her goals. In the absence of face to face

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experience of one another, the strategy document takes on the role of a constant reference point. Referring to it helps her to disengage from the immediate situation, which is consuming her, and to re-engage with the bigger picture. This often calms and mobilizes her.

While my client's goal is to be VP, I do not work with the same goal in mind. Without direct observation or data from the system, I cannot evaluate her capacity to take such a role or judge her chances of success. Additionally, the system itself has not contracted with me to help her achieve this goal. As I said in the introduction, my goal is to help her develop a capacity to explore issues from the perspective of her organizational role and to understand herself in the larger system. Whenever possible, I offer organizational hypotheses for situations she encounters and cannot understand. Because I have no direct data, I am quite free to experiment with hypotheses from the others' perspective. For example, I might speculate that a critical superior has anxieties about pleasing her or that a peer who has distanced him/herself may feel quite uncertain how to develop a relationship with her. I frequently invite Leslie to develop her own hypotheses.

A client's relationship with a consultant can be compared to her relationships to the primary players in her life. One could say that the issues and transactions in this relationship are enactments of issues in the client's past. When they are noted and worked through, they illuminate the client's internal world and can result in positive change (Mersky, 2001). There is less opportunity for that material to arise when working over the phone, so I pay a great deal of attention to all boundary issue between us, in order to identify possible enactments that can lead us to some insight. For example, there was a period of time when my client would talk beyond the scheduled end of the hour, as if we had unlimited time. I felt abused by her and yet somehow powerless to speak up. Feeling particularly hopeless one evening, I admitted my confusion and helplessness. This led her to reflect on recent experiences with a superior who continually hangs around her office. She has not known what to say to him. We realized that I was having a parallel experience to the one that she was having with her superior. After that episode, she would often anticipate the impending end of a session and would take the initiative to conclude it on time. I began to realize the effectiveness of this intervention, because each time I held a boundary in our relationship or attempted in retrospect to explore a transaction between us, I found her to be more amenable and reflective. Following those interventions, the most progress seems to have been made.

Conclusion: The Professional Challenges of this Work

I believe that face to face work is always preferable to working by phone. On the other hand, I have learned from this consultation that it is still possible to do something useful using this medium exclusively. As Sulkowicz (2000, p.12) puts it: "It's not optimal, or the gold standard, but it works."

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The feedback and supervision I have received has helped me to maintain clarity regarding my goal for this consultation, which is to help her develop a capacity to explore issues from the perspective of her organizational role and to understand herself in the larger system.

While goals that might be more appropriate for personal analysis are not my focus nor my area of expertise, I do believe that my client would greatly benefit from psychotherapy. What limited interest she has in working on her personal issues, however, is exclusively directed toward achieving success in her organization. One can presume that this is a client for whom psychotherapy might be overwhelming and anxiety arousing. I have had many clients who would greatly benefit from psychotherapy but feel safer exploring personal issues in the context of organizational ones. Leslie is a more extreme case, in that even face to face consultation would seem to arouse unbearable anxiety in her. For someone like Leslie who might not otherwise stay in consultation, I believe that working this way provides continuing connection and ultimately greater prospects for a better work life. Leslie does not have to disconnect to move forward nor does she have to be swamped by the other.

Given the unusual nature of this work, I have often reflected on why I undertook this consultation. I have been encouraged to continue by my client's commitment, my supervisor's help, my own economic gain, and my interest in exploring new territory.

As to the client herself, she is pleased with our work and often expresses her appreciation. From the perspective of her original goal, the consultation seems to be succeeding, as she has moved up the system impressively and now holds a senior position with a competitor. As she has moved up in status and responsibility, I have experienced her to be less contemptuous of others and more professionally satisfied.

As has become evident, working by telephone dramatically influences how one consults. It requires a new learning curve. Without the visual and contextual clues characteristic of the preferred consulting situation, one must put greater emphasis on other sensibilities. The continuing question I ask is what is being excluded and what is being added by working this way. To continue to ask that question is to remain conscious of the ambivalent nature of this way of working and my own struggles to expand my insight and competency.

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