Outside Insight: Balancing Private and Public Inquiry

A Conversation with Peter Senge and Saj-nicole Joni

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PETER SENGE (PS): A cornerstone of organizational learning is effective inquiry - enhancing the individual, team, and organizational skills necessary to inquire into complex and conflictual situations. When managers apply established ways of thinking and acting in knee-jerk fashion, without even realizing or questioning that this is happening, they make bad decisions, and they erode trust by failing to listen to differing points of view. Over time, people can get frozen into counterproductive defensive routines in which crucial issues become "undiscussable" and practices that many question privately are not confronted publicly.

In the organizational learning field, the standard response to this dynamic has been to build skills and norms around greater public inquiry, such as helping management teams discuss tough issues by learning how to surface and question their own assumptions. But some issues, like those involving difficult personnel matters, can never be fully examined in the team context. And executives who fall back on private advice from people who have a stake in the outcome can also form distorted perceptions. What's needed is a different, more impartial, kind of adviser that can provide "the third opinion."

Let's start by talking about what parts of inquiry should be done in the teams or larger groups that will be carrying out the work, and what parts should be done privately, either with members of the organization or with impartial advisers.

SAJ-NICOLE JONI (SJ): As an executive, I found that the better the quality of our work groups' collaborative inquiry, the more I needed to be well supported in the private aspects of inquiry. Initially that was quite confusing to me, because it was politically correct to do all our thinking in the group. But I've come to see that "private" individual inquiry - first-person, or what might be called "first-opinion" reflection - is inextricably interwoven with collective, or "second-opinion" inquiry. Both types are always happening.

Team inquiry comprises individuals, all of whom work at thinking about, gathering information for, and developing their understanding in the group. They also do some of that on their own. It's an organic process: sometimes shifts in thinking happen for individuals when they are in physical proximity or community, and sometimes when they're in quite private spaces. Sometimes shifts happen based on public conversations, interactions, or experiences that then mesh with other experiences that are private. There's a kind of interweaving of these processes. Both public and private reflection are necessary; in fact, they're interdependent. During the past 10 years my work has evolved into focusing on "third-opinion" advising - essentially, private advising with senior executives who typically spend a significant amount of their time in collective decision processes. These (private) advisers are a kind of "kitchen cabinet" - they aren't directly engaged in the action but allow executives to sort through information and perspectives and to push their own thinking forward. These third-opinion advisers are an integral, yet separate, part of executives' leadership in making decisions with the collective.

PS: How did you come to see that third opinions were important to your own work as a manager?

SJ: I found I often had to engage subject matter experts in collective inquiry with me. I had to learn how to dig in with these experts. But it was difficult to think together with them in a truly collegial way, and easy to become completely dependent upon their advice. I realized that there were many ways to see an issue, and while seeking diverse perspectives I also needed someone who was objective enough to act as a sounding board. I needed to talk it out and process my thoughts to reach a decision or point of view.

This third-opinion work can be public or private, with individuals or with groups. Its two hallmarks are: (1) outside insight, and (2) no vested interest in the particular decisions. As an outsider, you might have opinions, but you're not invested in them. You're serving as a thinking partner, but you don't have an agenda. Your thinking is independent of the organization's culture and embedded stories, and it's no-holds-barred. You tell the truth, even if the truth puts you out of the job of advising.

As contrast, the hallmarks of second opinions lie in their sources - people with great expertise and insight who have significant interest and stake in the outcomes of the decisions. This includes most people on our teams, often our peers and bosses, and many outside partners and consultants, as well. First opinion, of course, is your own reflection and personal thinking. I don't want to be misunderstood: second opinions are extremely valuable. We all want to be surrounded by and to work with great and passionate second opinions. They are just not the whole story when it comes to the full range of leadership and inquiry.

PS: It seems to me that most of the models for inquiry and learning that have become popular during the past couple of decades focus on the process of team-based, collective inquiry. For example, Argyris's and Schoen's single- and double-loop learning models focus on "good" learning that takes place in public, in an open way, and not in private. The bias for many of us seeking more learning-oriented and effective cultures is for open, collective inquiry. This bias arises for good reason in reaction to traditional, shadowy, "adviser to the president" types who often have the greatest power and the least accountability. More open and honest reflection and inquiry in working teams are antidotes to the kind of rigidity and abuse of power that can occur when everything is offline, private, and hidden. But the framing you're describing is of a much more complex decision-making process. You're saying that both public and private inquiry, learning, and decision making are important, that neither kind is better than the other.

Is there an example of a question that would be unproductive to bring to a group?

SJ: Suppose I had past business experiences that I hadn't fully resolved intellectually or emotionally. It isn't necessary to subject the whole group to my puzzling out what happened or what was really true and relevant. Of course, sometimes being revealing and letting the group see me struggle with a certain issue can be productive. But all of us only have so much time available to spend together; it's precious and needs to be respected.

PS: Yes. There's a thin line between vulnerability and self-indulgence. Revealing that I'm struggling with something can be really useful. It can engage others in the struggle, and give them some insight into my deeper assumptions - which may also help me. But it can also become almost an abuse of a team. Carried to an extreme, the team meeting becomes the boss's psychotherapy session.

SJ: Exactly. In addition, different people have different thinking and framing preferences. I naturally, and unconsciously, start with a very big picture of how things work, and then see things in relation to this framing. As a leader, early on I became aware that not everyone thinks this way. Many people build up a big picture from smaller pieces. I also became aware that there might be other big pictures to consider. It's important that I have opportunities to challenge and develop my own ways of thinking.

PS: In a situation like that, you would look for an adviser who would naturally appreciate the kind of frames you generate and who could also generate different ones. That's a little different from simply reflecting on my blind spots or biases, as is emphasized by most process

consultation methods. It's more like considering "what are my thinking predispositions vis-à-vis an issue like this?"

SJ: Yes, that's one role an impartial observer can play, but there also are many practical reasons why leaders need to cultivate their third-opinion network. For example, an executive may need a place in which to ask questions that would have unintended and inappropriate consequences if explored in the group setting. Say you were a business unit leader thinking about exiting your core business. You would need to work through many considerations with people who would be affected by your decision. But to prepare for those conversations, you would need to do some important preparation and thinking, and have in place good sounding boards in people not attached to the outcome. Otherwise you would have to work everything out either in isolation, or with a group of people who were definitely not disinterested. If you broached the subject in the group before you were ready, you could easily put in motion cascading reactions that might trigger a lot of unintended consequences.

Ideally, you need one or more individuals whom you know and trust, and who are from outside the system, have the right expertise, and don't have a vested interest in your decisions. Some consultants fall into this category but others do not.

The trouble is that most consulting firms have a natural and explicit interest in expanding their work and most are set up to look for opportunities to leverage their expertise and teams. Every executive who hires consultants is aware of that business model. Consultants who provide third opinions, by contrast, do not seek to maximize their tenure or expand their firm's role into implementation and follow-on work.

PS: I have seen a few consultants who acted more as elder advisers: they were there as a resource to a community, but were not always intensely engaged. They got to know a company as a culture, and grew to appreciate the business more deeply because they could see the business problems and dilemmas from multiple perspectives. In such a role, over time they develop a kind of connection with the organization as a whole, and feel a sense of real affinity for its mission, its purpose, its culture, and its personality - warts and all. Isn't that possible?

SJ: It's possible, but is not the most common sort of role, because it can be hard to sustain over time. Most people find that the more they get involved in working in the system, the more difficult it is not to have a stake in the outcome. At some point, people are pulled over that line. It is a very interesting gray area to explore.

PS: I can see that, but let's talk more about the meaning of the phrase "stake in the outcome." It's impossible not to have opinions. We're human. We have opinions. It's impossible not to think things like, "This seems like a stupid idea to me."

SJ: We all have opinions and we all have stakes in outcomes, even if that stake is only that we want to be highly regarded as a smart person who had a good idea. I write about something I call "structural trust": trusting that someone's agenda does not, and will not, compete with your own. It's different from trusting someone personally or trusting someone's expertise. It's often tied to roles and involves whether people stand to gain - in stature, financially, by promotion, or in power - by the decisions you make. If they do, you won't have the highest levels of structural trust and that will compromise the inquiry.

PS: So, on the one hand, we each have a personal stake in being perceived as effective. But, I hear you suggesting two ways that can be effective or productive: first, the client might do what

you've advised, and second, the client might say, "Thinking together with you was really useful." And you're talking more about the latter.

SJ: That's right. Your stake, as adviser, is really in the totality of the relationship rather than in any particular outcome from the relationship. You are not invested in being right or in being smarter. It's a framework in which you can tell the truth. There's true mutuality in the relationship.

PS: That makes so much sense. Most consulting or advising is one-way. The adviser is an instrument to aid the client, as opposed to how it is in a real relationship, in which neither party is an instrument of the other's need to accomplish something. It's an intrinsic relationship.

I remember a comment Chris Argyris once made before a seminar. Chris is very well known and respected. But he's also experienced a fair amount of mean-spirited, thinly veiled nastiness from academics because his work is quite radical. We were chatting about this and he said, "You know, what I most like are the people who are really high on admiration and really high on criticism." It was a lovely way to point out the dualistic either-or framing that we can fall into. A relationship with somebody that allows you to be critical of each other, while still admiring each other, can be very rewarding. It defines a particular kind of trust. In my experience, those sorts of relationships don't always require a lot of time to develop. Sometimes there's very strong intellectual and emotional chemistry and it just clicks.

Having that kind of deep connection with someone outside doesn't lessen the kind of support and inspiration you get from your team - those are essential. But everybody around you is usually caught up in the same things. The danger of talking only with your peers or subordinates is that everybody can subtly start colluding with everybody else, reinforcing established points of view. The kind of reaffirming connection we're talking about has to come from outside your immediate circles of formal relationships in a work setting. I would call it co-inspiration.

Comparatively speaking, most of us are relatively sophisticated as individual thinkers and relatively unsophisticated as collective thinkers because so little of our training and education is about what it means to engage in collective inquiry. So we have to recognize there's a natural bias toward private, individual inquiry. I'd like to think that, over time, if this process of balancing collaborative decision making and private reflection and advice works, more of our difficult issues would find their way into the collaborative realm.

But that raises another question: how does one assess whether the whole process is working? For example, it would be very disconcerting if, as a result of some wonderful private thinking and advising, I had less to bring to my team for discussion. If that happened, in effect, the whole process would be abetting my predisposition to avoid the conflict, messiness, and vulnerability of coming into truly collaborative inquiry. It seems to me that the first criterion for judging progress is that the range of topics that I bring to collaborative inquiry is expanding, along with my tolerance for conflict, differences of view, and all the emotional struggles that inevitably will attend collaborative inquiry.

SJ: I've found that many of the people I work with can and do raise the complexity of what they take on and try to move into a much larger inquiry. They can broaden the scope of inquiry with their natural teams. But they also start to see that what they thought was the team-sized inquiry is only one node in the network of teams that have to be involved. They become much broader and inclusive, sparking multiple sets of inquiries and conversations.

I think there are three questions to ask to measure the health of the inquiry process. First, are the richness and complexity of the inquiry inside a team increasing? Second, are the connections between public and private inquiries growing? And third, are more people encouraged to find their own balance between private and collective inquiry? As the level of collective inquiry rises, invariably the need for private inquiry increases, as well. Private inquiry becomes more important if the collaborative inquiry is permitted to get to the really tough stuff. My hypothesis is that some very well-meaning and pretty skilled collective inquiry gets stalled because it doesn't have this balance.

PS: For the reason you just identified, many people that I respect a great deal have set up their practice of team development so that there's also intense personal coaching happening simultaneously. You get to tougher and tougher issues. You can count on that old saw: "If it's going well now, it'll get tougher." I think what you've been saying all along is that we often can neglect the personal demands this can create.

SJ: That's true, but it's only part of the story. I think of these as "individual" demands, which are often much broader than what we mean when we say "personal." Personal demand sounds like it's about a leader's psychological or coaching needs. But this is about individual *business* demands, individual content demand, and building individual capacity to think in complexity. Typically, coaching has tended to focus on the personal aspects of leadership. That's very important as the heat goes up, but people need other kinds of resources in their private thinking space.

PS: Yes, I agree. This raises a very practical problem. I'm surprised that it wasn't evident to me before. The whole OD [organizational development] field has suffered for 40 years from the plethora of people who come to it with behavioral science training, who want to work in business, but who don't actually have much expertise or feel for the real business issues. You might define the difference between what you're calling third-opinion work and coaching in an analogous way. Coaching means a lot of things, but 9 times out of 10, it requires little, if any, deep business knowledge.

SJ: Here's a useful way to think about this: executive coaching is a narrow genus, or type, of third-opinion work. Almost all of us can use this type of personal coaching at certain junctures and for particular challenges in leadership. But I have seen leaders make big mistakes when a coach plays too big a role. For example, guided by their coaches, many leaders focus on trying to fix cultural issues in organizations when the things that are really "broken" are strategic issues. And then there's this myth about isolation that we touched on earlier. Many people hold the idea that when leaders and teams engage in collective inquiry, members' isolation will de facto be reduced. True, and not true. In many cases, the better people get at wading into the hardest inquiries, the more it raises levels of isolation, because people get to difficult issues that can no longer be pushed aside. If we really want to support organizations and societies in doing this inquiry work well, we have to understand that these two forces need to work in harmony.

In the 1980s, when I first started to lead collaborative inquiry, I thought, "Oh, great - I'm in a company that's committed to collective inquiry, and as an executive, I don't have to know all the answers anymore. I can work with my teams, and I can be much more open." But I discovered that, although this was true, in unexpected ways my isolation also grew.

PS: This can be one of the most insidious, undiscussable phenomena. If we're all into collaboration and teams, there's no space for me to say, "Hey, wait a second, I'm feeling more isolated," because it would be tantamount to saying I'm not with the program of collaboration

and team development. Maybe one simple reminder is that making headway in creating a culture of collaborative inquiry does not cause the "left-hand column" to disappear. We will always have private thoughts and feelings that we do not share. Creating that cultural change also does not resolve all of people's issues about what to discuss and what not to discuss.

We have an illusion that somehow, once we figure out this collaboration stuff, work is going to be a lot better. But it isn't. As we unleash the collaborative capability, we naturally take on harder issues, and ones that matter much more. And as you say, there are more and more demands, on interpersonal and emotional, but also on strategic and operational levels, so people have a greater need for private space in which they can talk with qualified people about their dilemmas.

SJ: We need to reincorporate the notion of private inquiry into the work of broad collaborative inquiry and decision making.

PS: Creating private space is one of the balancing processes critical to collaborative inquiry; failure to create that space prevents real collaborative cultures from maturing very far. People run into problems that they cannot discuss, and eventually, this stifles the collaboration. A slightly different way to say it is that becoming better and better at doing things together requires becoming better and better at doing things on one's own.

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