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SYSTEM CONSTELLATIONS AS A TOOL SUPPORTING ORGANISATIONAL LEARNING AND CHANGE PROCESSES

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ABSTRACT

Originally developed in the context of family therapy, system constellations are introduced using an organisational learning and system theoretical framework. Constellations are systemic group interventions using a spatial representation of the system elements. They correspond to deutero-learning processes and use higher-order systemic thinking. Several company cases are analysed where constellations were used to overcome organisational defensive routines of the participants of a change process. The analysis shows how a certain set of systemic principles, which is identified, is at work in situations where organisational defensive routines block learning and prevent the creation of sustainable solutions. It is shown that system constellations can help organisations deal with complex management situations. The relationship to other organisational intervention methods is discussed and possible directions of future research are highlighted in connection with a brief review of the relevant scholarly literature.

KEYWORDS

System constellation; organisational learning; team development; organisational defensiveness; group dynamics; organisational development tool; system theory; introduction.

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BIOGRAPHY

Marcus Birkenkrahe is a Professor at the Berlin School of Economics and works as an executive coach in leadership and team development. He studied physics, contributed to the original development of the World-Wide Web, and worked for ten years in executive positions in strategy and knowledge management at Accenture and at Royal Dutch Shell London. He taught at the University of Auckland Business School, and is now professor of business information systems at the Berlin School of Economics, Germany's largest business school. He is also a trained in psychotherapy, and regularly uses organisational constellations in his executive coaching practice.

INTRODUCTION

A central question for practitioners, consultants, and researchers into organisational learning and change, is how to deal with the phenomenon of organisational defensiveness and avoidance, unfreeze problem situations and revitalise the learning and change processes.

Designing interventions to overcome defensiveness in organisations has long been a study area of organisational learning theory. Argyris (1993) identified situations where the actors only learn from their mistakes (by changing their strategy) as single-loop learning, and those situations where they considered the reasons for choosing a particular strategy (the „master program“, or mental models) as double-loop learning. Neither single- nor double-loop learning can be used to correct course when avoidance behaviours rule.

Another suitable conceptual setting for the design of intervention strategies in the presence of organisation defensive routines is systems theory (Wiener, 1948; Bateson, 1972; von Foerster, 2003). When managers imagine that they can control their environment in an optimal way, they adopt first-order systemic thinking. Single-loop learning is an example for a first-order systemic behavioral strategy. Second-order systemic thinking, on the other hand, comes out of a *constructivist* philosophical attitude (Watzlawick, Weakland and Fisch, 1974) and requires awareness of, and reflection on, our double identity as both participants and observers in a process: „Second-order thinking is the continual attempt of managers and researchers to be aware of their own framework of understanding.“ (Stacey, 2007). Double-loop learning is an example of a second-order systemic behavioral strategy.

The challenge for members of systems which behave defensively is to go up one level systemically, and look not only at their framework of understanding but also at the preferences which cause their choice of preferences and their creation of (defensive) mental models. Argyris (1999) calls this deutero-learning, while with Bateson (1972) we would speak of higher order systemic thinking. Stacey (2007) calls this the “observer/participant paradox” claiming that „it rapidly runs in some kind of mysticism“.

In this paper, it is shown that it is possible for managers to deal with the observer/participant paradox by solving systemic issues using the organisational constellation technique, which allows them to be both inside and outside of their system at the same time. Used in family therapy for the past 20 years, constellations are increasingly used in business to analyse complex situations and to find solutions when other methods of organisational development fail.

In the following, an example of a typical problem situation is used to illustrate the key problem situation. A general introduction to the method is given, and the process is explained in detail for one type of constellation which is likely to be the most common in a business setting using several case studies.

METHODOLOGY

This paper is an interpretative field study used to generalise from certain behaviours of groups of managers in modern organisations. In the sense of Walsham's types of generalisations from interpretative field research (Walsham, 1995), it is a „contribution of rich insight“.

The phenomenological (scientific) method is used in the sense of relating several different empirical

observations of phenomena in group workshops to each other, consistent with fundamental theory, but not directly derived from theory. This investigation is also related to philosophical phenomenology in the sense of a study of observations from a first-person perspective, in this case from the group facilitator's point of view who sets up an organisational constellation. Though this work is motivated by arguments and insights from action science (Argyris, 1993) and systems theory (Bateson, 1972), no attempt is made to derive the phenomenological insights from these theories.

The case studies draw on three pieces of organisational constellation work, and are developed throughout the paper: 1. with a large multinational company (A) in December 2005 during a global strategy workshop with the country CEOs and top HR management; 2. with a group of high potentials of a medium-sized German company (B) during a team building workshop which was part of a one-year development programme, in March 2008, and 3. with the owner of a small business in New Zealand as part of a workshop demonstrating the organisational constellation method (company C). All workshop sessions were recorded and the case studies are interpretations of the original session transcripts.

LITERATURE REVIEW

Compared to the enormous spread of constellation work world-wide in the last decade, there have been relatively few scientific studies and theoretical model building of the system constellation method (Stresius, 2006). Most publications are not of a scientific nature and were produced by practitioners to explore and aid further applications of the technique. In the area of organisational constellations, most researchers are interested in ascertaining whether constellations have sustainable effects, which has neither been the focus nor the claim of this article. Examples for the range of studied firms and situations include relationships of personnel in service-based businesses (Ruppert, 2000), the relationships of owners in family-owned firms, and the use of constellations in executive coaching (Horn and Brick, 2005). Two recent results, which are only available in German, are particularly interesting for our discussion and will be outlined briefly.

Schlötter (2004) carried out a large empirical study looking at the semantics of system constellations. In his experimental setup, Schlötter used 250 human subjects in 3900 individual experimental settings. The subjects were confronted with systems stemming from real consulting cases, which were built using life-size figures. For each system, the initial (problem), and the final (solution) constellation image was rebuilt. The subjects were asked to put themselves in individual positions in these systems and assign, using free speech and prepared text, profile descriptions to the figures which they were representing. The subjects stood first in the problem constellation, then in the solution constellation.

His findings shed some light on the basic mechanism of representative perception: he identified constellations as a non-verbal language exchange between the people participating in a constellation, which is independent of effects of individual socialisation. He interprets constellations as a tool for the meta analysis of a social system that is based on meta communication that works, essentially, without translation into spoken language. This also answers the most frequent question of constellation participants on how much the result of this work depends on the people who were there. Schlötter's research seems to establish that the result of a constellation is

largely independent of individual participants.

In his published, extensive Ph.D. dissertation, Gminder (2005) looked at how organisational constellations can support the execution of strategies for corporate sustainability. He identified constellations as „a content-free tool, which is particularly suited to analyse complex situations in the 'soft' areas of management and culture, and create tailor-made solutions“. Empirically, he presented seven different case studies in different industries. He concluded that organisational constellations are suitable for „numerous issues in the context of normative, strategic and operative management [...] especially for the clarification and simulation of 'human' relationships [...] and the dynamics in or between companies.“

ORGANISATIONAL DEFENSIVENESS

When a team, for example, experiences a conflict that paralyses their performance, it is possible that this team enacts the conflict on behalf of the entire organisation. Only when we enlarge the problem context to include the larger system can we hope to find a solution for the team. In fact, opening the eyes of the team members to this possibility may already suffice as an intervention – the team relaxes (they no longer feel culpable) and their chances to engage in a learning process are increased.

The following case example illustrates the effects of organisation defensive routines in the case of a large multinational company:

Company A: *Ten country business managers of a large multinational company, and three HR executives including the Group HR director, meet for several days to decide on the direction of a company-wide organisational effectiveness (OE) project. On the second day, the Group HR director (and project leader) feels that the group has lost the big picture perspective and already spends too much time on details before getting the main storyline of the planned process right. He does not share this view with the others, knowing from previous experience that the majority of the managers would close up and only meet his challenge with more resistance. He assumes that they feel defensive about perceived attempts of the corporate centre to second-guess the countries' operational effectiveness. Underlying this conflict is a larger conflict between organisational units, about the governance structures and decision processes in the company. This conflict, however, is not addressed directly. Instead, all participants in the process collude in bypassing a discussion of the underlying conflict. The group bypasses this discussion by focusing on detail too early on, and the HR director addresses not the conflict, but the bypassing attempt, by blaming the group for their avoidance behaviour.*

In this case, the group experiences a problem whose origin does not lie within the group: the issue of power balance between country businesses and corporate centre is acted out representatively by these managers.

The described intervention process also works the other way around, via system reduction – the origin of the conflict affecting the whole team may well be a conflict between two of its members. Until the problem context is redefined to exclude the larger system, any intervention is less likely to succeed. Again, opening the eyes of the team members to the possibility that the reduced system

may be disturbed might already relax the atmosphere enough in order to move on to sorting out the two-member conflict.

The need to reduce the observed system is frequently seen in executive coaching, for example:

The top manager of a large chain of department stores spent considerable time complaining about recent restructuring of a sales region. Later, it surfaced that his real issue was not with the structural decision, but with one of his peers who would get two of his department stores with a very high turnover, which he had brought back into the winning zone, without any return for the client.

The system suitable to resolve this conflict was the reduced system containing him and this colleague. After being confronted with this option, the manager could focus on the personal relationship with his colleague and achieved a major improvement. He also stopped complaining about the structural changes. Both examples illustrate the benefits of being able to leave the own system and enlarge or reduce the size of the system used to define the problem – and the possible solutions. The organisational constellations to be explained next are an approach using both techniques.

ORGANISATIONAL CONSTELLATIONS

A systemic constellation is a spatial representation of a system, or a group of interacting elements with a boundary. These elements can be individuals (e.g. boss, employee, board member, customer), groups of individuals (e.g. department, team, family, board), impersonal groups (e.g. country, company, market), or concepts (e.g. goal, profit, product, brand, strategy, merger).

In a constellation, the system can be represented in a number of different ways. Most common in practice is representation by people – one person represents the boss, another represents other team members, and so on. Typically, the people who represent others in a constellation have no actual relationship with the people whom they represent. They do not even have to possess any prior knowledge to act as representatives in a constellation. Hence, constellations are not role plays, even though an observer may initially get this impression. Rather, they work through a mechanism called „representative perception“, which seems to be a universal human ability to express the complex pattern of someone else based solely on their position in a system.

Representative perception is responsible for an effect that almost every constellation shows: the representatives are able to make important statements about the system dynamics and about information which they have not previously received verbally. This phenomenon is particularly useful if a representative can point to a missing resource or fact which the client had not thought of, but which, when it is mentioned, leads to a realignment and profound change in the client's mental model.

TYPES OF CONSTELLATIONS

There are two traditional types of constellations: family constellations – used in family therapy, and organisational constellations – used in organisational development. A family constellation is a constellation of a family system – e.g. the family of origin (father, mother, siblings, ancestors), or the present family (e.g. husband, wife, children). An organisational constellation is a constellation

of an organisational system of any kind— a company, an agency, a country, a government, or a team.

In this article, and especially in the case examples to be discussed later, we are primarily interested in organisational constellations in the context of team building and development, as in the following example of a medium-sized company:

Company B: *A group of 12 high potential managers of a medium-sized company meet for the kickoff meeting of a development programme. Sponsored by board management, they are charged with the task to define, plan and execute an interdisciplinary project with visible synergy effects for the whole company. All group members work in different businesses, are from different age groups (ranging from 27 to 39) and have not worked with one another before the workshop. The workshop leader uses the constellation technique in order to (a) speed up the process of creating trusting relationships between the group members, and (b) help them define candidates for potential projects as quickly as possible.*

Other application areas for organisational constellations are: knowledge management (Birkenkrahe, 2002), project management (Groth, 2004), HR development (Metz and Messerig, 2000), outsourcing and finance (Birkenkrahe, 2004). There are also other non-traditional applications of this method – e.g. in scriptwriting (Brock, 2004; Alex, 2005), branding (Jurg et al., 2008), politics (Mahr, 2004), and environmental systems (Cox, 2007). All of these follow a similar process (see below), which was historically established by the family constellation method, the application in family therapy.

BRIEF HISTORY OF THE METHOD

The constellation method is a rare example of an organisational development intervention which can claim to have universal appeal. *Familienstellen* was restricted to the German-speaking world for about 10 years after the first family constellations were carried out under this name in the mid-1980s by the German therapist Bert Hellinger, a former missionary and teacher with philosophical, psychoanalytic and therapeutic training.

The reason for the peculiar initial restriction to Germany may come from the fact that constellations were first used to address issues related to the events of the Holocaust. The method then spread very quickly, especially because it solved problems of individuals who were too young to have directly been involved in the Holocaust, but who suffered because of what happened to others in their family system. Constellations did this for descendants of both victims and perpetrators of the Holocaust. The fact that many nations are implicated in genocide or other national traumas in the course of history may account for the world-wide spread of the family constellation since the mid-1990s.

Hellinger (1999) himself amalgamated family constellations from a number of different therapeutic disciplines, most of which he picked up in the course of his own training and practice, including Transactional Analysis developed by Berne (1964), Primal Scream Therapy (Janov, 1977), and Family reconstruction and sculpture work pioneered by Satir (1967). In practice, elements of psychodrama, founded by Jakob Moreno (1959), are also used in constellations. Organisational consultants watching a constellation would also be reminded of techniques used in the Neuro-Linguistic Programming (NLP) technique developed by Bandler and Grinder (1975).

The family constellation method was first applied to organisational systems in the mid-1990s by Weber (Weber and Gross, 2000). It was subsequently refined in particular by Varga von Kibéd and Sparrer (1998). Like its therapeutic sibling, family constellations, it is now increasingly practiced around the world, primarily by management consultants and executive coaches. It is increasingly professionalised through a growing number of specialised journals, international conferences and quality-controlled trainings.

A detailed discussion of the learning processes involved during and after the constellation process is outside of the scope of this paper and will be provided in a subsequent publication. However, some of these processes may be seen as examples of situated learning as first proposed by Lave and Wenger (1991).

To better understand the effect and contribution of the explicit therapeutic antecedents of the constellation method, we need to take a closer look at the purpose and the principles, which are made visible by looking at human work systems using constellations.

PURPOSE OF CONSTELLATIONS

The purpose of setting up a constellation for a client is to clarify complex relationships by gaining insights into the dominant behavioral patterns of an organisational system, and to make effective interventions based on these insights on the fly – simulating what might happen in the real situation. More specifically, constellations can help to

- 1) overcome organisational defensiveness (see e.g. company case A)
- 2) establish or improve relationships (see e.g. company case B)
- 3) uncover hidden truths or facts (see e.g. company case C below)

The clarification comes about because the constellation is initially a representation of what is, rather than what a client would like to see. The simulation is then a possibility to play out different alternatives of a scenario, or of relationships. In comparison with other intervention methods used in the change management area, constellations have been shown to yield results faster, and often lead to more sustainable results (Gminder, 2005), which explains the increasing interest by businesses in trying this method in the past years.

Sustainability refers to the fact that constellations have been reported to have far-reaching effects beyond the setting up of a problem and its solution. This is, however, not really surprising: one would expect any intervention to produce results that are felt and visible outside the workshop setting where the intervention took place. More surprising is that such sustainable effects can be observed in constellations where the client is the only person who is physically present from the work system that is being observed and worked with.

Company C: „Who is the best buyer for my business?“ *Katherine, the client, a young woman and a former snowboard professional, runs a small, successful business selling snowboarding equipment. She now wants to sell her business, since she is embarking on a university career.*

She has got three potential buyers lined up – one is a current employee, one is a friend of hers, and another is a current competitor. Her problem is that she cannot decide which of them to sell to. Money is only one criterion, but she is unsure, what else to base her decision on. Her desired solution would be to settle on one of the three. As an added complication, she has got only ten days left to close the deal, because of a long-term contract with a supplier. The constellation shows that the employee is the best buyer; and that Katherine needs more support from her father. Even though Katherine did not talk to anyone about the constellation, within a couple of days the employee came forward with great determination, and her father, who had shown no interest in supporting her before, helped her get a great deal. As a result, although she had considered it unlikely, Katherine sold her business to the employee, her preferred buyer, within ten days of the constellation.

PHENOMENOLOGICAL PRINCIPLES

It has been argued that an important reason for the effectiveness of constellations is that human systems obey certain phenomenological principles. Once these principles are violated, the system reacts with destabilisation and performance loss. Based on many years of work with clients in constellations, Hellinger (1998) identified five such general principles in the context of family systems. With minor alterations, they carry over to organisations:

- The principle of belonging (system existence) – this principle determines who is part of a system and who is not. This principle might be violated, for example, when an employee of a company is excluded without being properly acknowledged for his or her efforts. This is a systemic principle, because it reflects the existence and importance of a system boundary.
- The principle of time order (system extension) – this principle honors the time which members have already spent as part of the system. When a system grows, this means that room has to be made for new members, while at the same time preserving the rights of those who already belonged to the system. When these are honored (for example by having the right to speak first), they will be more willing to make room and help the new members of the system to find their place.
- The principle of inverse time order (system replication) – this is the reverse of the abovementioned principle: if a system is replicated, the younger system has a higher order of precedence at first: for example, the system boundary of a company spin-off initially has weaker borders than the parent company. In order to grow into a strong system, it need special protection. Because of the inner competition between the old and the new systems, this order is a delicate balance.
- The principle of responsibility (system immunisation)– this principle demands that outstanding achievements are acknowledged because of their effects for the entire system. This is also an important principle of systemic leadership development: unofficial leaders need to be honored while at the same time preserving the official hierarchy of the system.

- The principle of higher ability (system individuation) – this principle supports development of the abilities and achievements of individual members by strengthening them through explicit appreciation. While rewarding performance furthers willingness to perform, rewarding abilities secures access to resources.

Von Kibed and Sparrer (1998) have articulated three meta principles, which are important for actual client constellation work:

- Acknowledging what is (system reality) – this principle prevents systems from being manipulated arbitrarily. A managing director has a lot more power to influence a company than a department head. Acknowledgment of the reality of the situation – in this example, of the hierarchical situation – leads to a heightened awareness of what is and is not possible within the system boundaries.
- Order of principles – this meta principle indicates the order in which Hellinger's principles are applied in order to have the best effect for the system: existence > extension > replication > immunisation > individuation. If the principles are violated, the consequences are more critical depending on their place in the order. For example, a violation of the principle of belonging (e.g. exclusion of system members) is felt more by all members of the system than if the principle of individuation (e.g. appreciation of individuals' abilities) is violated.
- Balance of giving and taking (system balance) – this principle is active in all of Hellinger's principles. For example, a company needs to balance additional performance in difficult times by additional tokens of appreciation (like monetary bonuses or rewards) in order to achieve a balance.

The following group exercise illustrates the mechanisms of three principles: the principle of belonging, and the two meta principles of system reality („acknowledgement of what is“) and system balance („balance of giving and taking“):

Company B (continued): *The 12 group members are asked to form a half circle, taking their position depending on their age: the oldest member is placed on the far right, the youngest member on the far left, so that everyone except these two has got an older group member on his or her left, and a younger group member on his or her right. The oldest is asked to step into the half circle, bow to everyone and say „I am the oldest member of this team“. He is then asked to turn to his neighbour and give him something (abstract) „from the heart“ - and so with the next person, until the end of the half circle is reached. People say things like: „I give you patience“; „I give you strength“; „I give you more joy in your job“, and so on. Now the youngest is asked to step into the half circle and says „I am the youngest member of this team“. He is asked to turn to his neighbour on the left, from whom he has received something as from an older person, and give him something back in return. The exercise continues until chain of gifts reaches the oldest group member. Now every member of the group has had the experience of seeing himself as part of the team (belonging), acknowledging his own place in the team (the unchangeable reality of relative age), and both giving and receiving something as part of their reality.*

SYSTEM CONSTELLATION PROCESS

Most organisational constellations follow a similar course, which I will describe and illustrate briefly. As you are probably already aware from other methods of intervention in organisational and leadership development, the power and particularity of a method that relies on group dynamics is not easily understood merely from reading about it. In the case of constellations, this is even truer than for other methods. Nevertheless, the process gives a fair impression of what happens when setting up a constellation in a group. Table 1 gives an overview of the steps, which are explained in detail with case study examples below.

No	Process step	Description
1)	Basic setting	Determine the basic setting: group or individual; human representatives or inanimate anchors; system members present or not. Different settings can be accommodated – the group workshop setting is most common
2)	Opening round	Warm participants up to experience system loyalty bonds and representative perception by using different group exercises, e.g. leading an imagined constellation of one's family or work system
3)	Client selection	Select a participant as a client who is deeply interested in obtaining a solution to a real problem in his organisational system (using, for example, the miracle question)
4)	Setting up	Conduct an interview with the client, focusing on desired solution. Identify initially important system boundary and people or issues, select representatives and let client set up the initial constellation in the room
5)	Constellation work	Help the representatives and the client transform the initial constellation into a plot with subplots towards a solution to the problem posed by the client, through listening, observing and checking with all participants
6)	Final constellation	Lead the constellation to a final image that incorporates a solution, a possible next step, or another important insight, giving the representatives enough freedom and structure to develop this image
7)	Closing round.	Help participants to cool down and close the immersive experience so that they can return to a more cognitive-level analytical state; avoid direct dissection of the constellation
8)	Follow-up	Offer possibility of discussing results and translating them into action, as well as follow-up constellations on different organisational issues

Table 1: Steps in the organisational constellation process (group setting)

1) Basic setting. The typical setting for a constellation is a group workshop with clients and a group of people who only serve as representatives but are not otherwise involved in the clients' issues. In individual settings (e.g. executive coaching) one can also apply the technique using chairs or toy figures to represent members of a system. Since constellations are not role-play, the people present do not normally represent themselves. Nevertheless, if one wants to set up a constellation with members of a team who are present, one ought to rotate them into different roles. There are also examples, however, as in the previous section where each group member stood only for themselves instead of for someone else.

2) Opening round. Constellations use existing loyalty bonds between members of a system as an expression of the sense of belonging. In order to give participants an opportunity to reflect on these bonds it is advisable to warm them up with simple exercises using the system(s) they belong to. The mechanism of representative perception can also be trained. Issues to be explored later on when a specific client has been selected often emerge without lengthy discussions during the preparatory phase.

Company A (continued): *First, the participants are asked to imagine themselves standing within their family system, including their distant ancestors. Second, they were asked to imagine themselves standing in their company system, including their peers, employees, and superiors. In a second exercise, one participant was chosen to represent the entire firm. Every other participant was then asked to represent anyone but themselves from the firm, and not to tell the other participants who they had picked. The group members were then asked to place themselves according to their intuition anywhere in the room relative to the representative of the entire firm. The resulting constellation was explored while the representatives kept their chosen positions, by asking the participants how they felt at their place relative to the rest of the group as well as by revealing whom they had chosen to represent. Once everybody had given feedback on their position, the representatives could change their position based on the information they had received. This first positioning exercise involving the firm already exhibited a number of potential issues, the most obvious one being the relationship with its customers. The majority of the participants felt that the firm was too focused on internal processes, and too little on the customer. Also, the importance of the newly appointed CEO became obvious from the positioning of the representatives. Neither of these issues had been discussed before – they emerged rather effortlessly from the spatial order, which the participants had chosen. During the break, several participants expressed their astonishment at the accuracy with which the situation of the firm had been captured in only 30 minutes.*

3) Client selection. In the group setting, an individual client is needed to focus the attention and to physically set up the representatives in a room. It is important that the client feels deeply interested in an issue – instead of being merely intellectually curious, or wanting to set up a constellation for someone else. Also, he needs to be focused, or get focused, on a solution to the problem. Especially with issues which cause organisational defensiveness, participants are often wed to their problem: it has become part of the corporate identity in an unconscious way. There are different techniques to test whether this is the case or not. One technique is the so-called miracle question, used by practitioners of brief strategic therapy (de Shazer, 2005), where the client is asked to describe, in detail, what would be different if, by some miracle, his issue had been solved. The ability to

internally align oneself with a possible solution state is the criterion for checking whether the client's process from problem to solution is advanced far enough to warrant setting up a constellation. Simpler criteria include non-verbal cues and signs sent by a potential client: is he visibly moved by an issue, or does he keep a distance? In a group setting, these tests are usually carried out in the course of a round. Since all members of the work system are deeply connected, there is no need to select anyone in particular (for example, the highest-ranking officer present) for the client role. As one might expect, it is not unusual for different issues from clients in the same organisation to differ considerably – they reflect the choice of an individual after all. However, in practice it turns out that more one issue can lead to a solution which is good for the entire system.

Company A (continued): *To identify a client and an issue, the facilitator conducted a round during which each participant was asked to briefly explain their current role in the planned OE process as well as one issue related to their role. It turned out that there were several potential clients in this group, who agreed between themselves to let one of them act as client for the constellation. The selected client was the CEO of a large European subsidiary company in his mid-40s. He had previously worked for a decade in senior positions in the parent company. His primary issue was „greater personal happiness in the firm“. He identified two other issues of other participants which had struck a chord with him: „renew pride in the company“ (mentioned by an elderly manager), and „establish a less hierarchical organisation“ (mentioned by a younger manager, who was relatively new to the company).*

4) Setting up. The next step is the last preparatory step before the actual (first) constellation: a short interview is conducted with the client to identify which system elements ought to be set up, i.e. positioned in the room. Especially in organisations, even more so than in families, the number of people who seem to be relevant to the problem is often staggering. Therefore, it is necessary (and requires some skill) to identify and select those who may not so much describe the problem, as contribute to a solution. All the information necessary for this decision comes from the client. It is always easier to keep an overview with fewer people standing in the constellation, therefore we try to begin with the minimum number of representatives. However, depending on the course of the constellation work, other elements/representatives can always be added (or removed).

Once the client has chosen representatives, he must also choose one additional representative for himself. This is one of the great advantages of this work for a client: he can get an instant view of his system from the outside – experiencing himself both as a participant and as an observer. Once the people are picked, the client has to set them up in the room by moving them into arbitrary positions in line with his intuition. Clients often ask at this step „how should I set them up?“ Of course, even small systems of few people represent an arbitrary and infinite number of possible relative positions. In practice, the representatives themselves will indicate whether the position they were moved into suits them or not – and their responses give the most important information for moving the constellation along.

Company A (continued): *as central to his issue of „greater personal happiness in the firm“, the client identified the company's CEO and three different factions within the company board, which he did not name. Representatives for these four and the client himself were chosen from among those present, and the client set the representatives up in the room by moving them into arbitrary positions in line with his intuition. This established the initial constellation, an image*

of the reduced system representing the problem, which which the client had earlier identified.

In this initial constellation, only one board faction stood near the CEO and was able to interact with him. The other two factions stood far away from the CEO and from one another, one of them even hidden from view behind a flipchart. The image suggested a disconnected leadership lacking alignment. The participants in the group reacted to this initial constellation with strong signs of recognition and dismay. They recognised the reality of the situation for the firm, and felt free to openly show their negative feelings.

The following work is an example of an initial constellation that was not used immediately for further constellation work, but as an input for analytical discussion:

Company B (continued): *for the team constellation, a different strategy was chosen: each member of the group was asked to place themselves relative to a chair in the middle of the room, which stood for „the customer“. The participants were not asked to represent anyone else but themselves. Empty chairs were used to stand in for absent members of the managing board, and were moved by people working with the respective managers until all participants agreed on their positions. The customer, the CEO, the CFO, and the Heads of HR, of IT, of Production and of Research were all represented by chairs. Once each participant had found their position, it emerged that most of the managers were standing in a cluster on one side of the customer, with the management board behind them. Only the representatives of sales and of R&D stood aside, far away from the customer. Now, a representative from the outside (not a member of the group) was brought in to stand in the customer's position. The statements of this representative were: „I feel too encroached upon. I have no breathing space. Everybody wants something from me. I cannot see clearly.“ She then moved from the central position into a position away from the rest of the group, next to the head of sales, where she felt much better.*

The constellation was halted at this point and used as input for an initial discussion on the potential synergy project, which the group was asked to design and execute as one project team for the next year. A heated discussion between the participants ensued, which centered on the relative position of the customer. Potential issues for the synergy project which came out of this discussion included:

- *More integration between sales and R&D*
- *More efficiency of operations, especially between marketing and sales*
- *Identify criteria for customer success*
- *Find a better place nearer to the customer*
- *Overcome „profiling neurosis“ of production and marketing*
- *Identify work interdependencies among ourselves*
- *Propose job rotation process*

All these issues can directly be related to one or more (relative) positions of the constellation image, which was used throughout the discussion as a reference point by the participants. To make this easier, the facilitator had asked the participants to mark their last position in the

constellation by fixing a piece of paper with their name on the floor.

5) Constellation work. Once the initial constellation is set up, the client is asked to observe what unfolds. Guided by the statements and expressions of the representatives in the constellation, the facilitator now guides the representation of the system trying to transform the image into one that represents a solution to the client's issue. At the same time, he must continuously check in with the client, who might have sudden insights, questions or ideas, which might prove helpful. This is the main work, and it is different in each case. There is no guarantee that a solution as imagined by the client can be reached. The constellation can be halted at any point. Even though there is no attempt at dramatization as in psychodrama, a plot and one or several subplots may unfold, and the facilitator, in concert with the client and the representatives as well as the on looking group, has to decide where to go next. As the following example shows, participants who are not initially part of the constellation can still play an important role. As the constellation moves along, it is important that the facilitator does not relinquish his role as the leader of the constellation – especially if there are many representatives standing around. At the same time, he must let the representatives contribute to the constellation:

Company A (continued): *after the initial constellation, the session developed its own, complex dynamic, including more representatives and approaching the real, equally complex situation of the company investigated. Important steps towards the final solution image, which involved active participation of the remaining group members, included:*

- *The CEO¹ establishes rapport with all board factions so that an alignment of interests becomes possible.*
- *Additional representatives of the company employees are brought into the constellation. They choose an object to represent the desired result of the organisational effectiveness (OE) process – a transparent, light cooler which happens to be in the room.*
- *The CEO and the board face the employees and receive the OE process result (the cooler) from them. They explore its properties and quality (by jointly touching and turning the cooler over).*
- *The employees express impatience and exert pressure on the board to get the OE process result back after the board has inspected it.*
- *The board and the CEO return the OE result to the employees.*
- *Using all remaining workshop participants, the OE process result is passed around and inspected by the representatives of different (anonymous) employees of the company. As this happens, the Group HR director almost drops the object.*

According to the participants, the choice of object – there were many other different objects available in the room – signified a number of properties that they considered important for a successful OE program: transparency and lightness; they also wished that the troubled relationships between the board members, which caused insecurity and unrest among the top

¹ In the following paragraphs, „CEO“ means „representative of the CEO“, „board“ means „representatives of the board members“ and so on.

management, should „cool down“. The dropping of the object by the HR director, who had previously criticised the participants in an (unconscious) attempt to bypass the actual conflict (primarily at board level), was accompanied by a sense of embarrassment followed by laughter and relief.

6) Final constellation. The series of constellations described above leads to one of three outcomes: (1) a direct solution to the client's problem – indicated by a new order of the system of relationships; or (2) a constellation which is not entirely satisfying to the client, that is, does not match what he was hoping for – for example, a reconciliation between hostile parties – but that provides insights into what needs to be done next and/or how to obtain a solution or a better situation; (3) a termination of the constellation if no solution can be found. In the last case, it may be that important information (from outside the constellated system) was missing, or that the client himself or the group feels too threatened by what they uncover in the course of the constellation – all of these can themselves be important insights, however. In this case, even though there is no final constellation, the work still affects the system if only through the client himself. If a constellation was set up by an individual client, and if this client has not played his own part in an earlier phase of the constellation work, he is usually asked in this phase to take the place of his representative in the final constellation, to take a last look at the solution image. After the constellation, the representatives also have to leave their roles – that is, the representative of the CEO (who is not the actual CEO) has to consciously leave his role behind and return to being a regular participant.

Company A (continued): *in the final constellation following the passing around of the OE object, the employees formed a half-circle, which was completed on one side by the entire board and the CEO. In the course of 90 minutes, the initial issue, which seemed intensely subjective („greater personal happiness in the firm“) had touched upon many issues which were relevant to the OE process. A clear solution constellation evolved: at its heart it signified a meeting of employees and leadership (including the participants in the room), and an exchange of the process of the OE results.*

Company B (continued): *at the end of the first workshop day, the participants were asked to go back to their positions from the earlier constellation and check them against their current feeling in the group and in the company. In the resulting image, the entire group had moved together more closely, with the customers taking their place between sales and customer service centre, forming an almost complete circle. The main result for this group was that they felt a lot more at ease with each other and with their role in the whole system. After this second constellation, the group achieved a significant breakthrough with the definition of their synergy project for the company. Several participants commented that, based on previous experiences with workshops in this company, they had not expected to be able to both feel like a team and identify a project, and credited the double constellation for that.*

7) Closing round. As the opening round means to warm the participants up, the closing round is important to cool them down. A constellation is a very immersive experience, which will only work well if the facilitator manages to lead the participants into a different realm of systemic awareness.

This awareness corresponds to an often visibly different state of mind, and many representatives comment with surprise on the fact that the constellation work helped them experience themselves in a completely different way, and occupy mental positions that were hitherto unknown to them. Lastly, the closing round is also an actual round in the sense that each participant is given an opportunity to comment on his experiences and insights. It is not advisable, at this stage, to allow the participants to dissect the constellation as if it were a play, scene by scene; although talking about the meaning for them is important, talking about the constellation as such frequently seems to have the effect of emptying the experience and draining its energy. It is equally important to discourage the participants from discussing details of the constellation with others outside of the group, and participants usually agree to this.

Company A (continued): *A number of participants who said that they had felt very critical of this type of work, said that they were impressed and touched by the process and by the final result. They felt that the final image sent a positive message, which they found encouraging.*

8) Follow-up. Both in therapeutic and in organisational uses of constellation, it is important to offer the possibility of follow-up, even though experience shows that individuals and companies rarely set up the same problem twice. If constellations are used in the course of a larger organisational consulting project, they can be used repeatedly, especially if the project participants enjoy it. More often than not, however, constellations are used when other more direct methods of intervention have already failed to yield any tangible results.

This concludes our detailed account of the different steps of an organisational constellation process.

DISCUSSION

The practice of organisational interventions has undergone major changes in the last 50 years: in the 1950s, there was a strong emphasis on measurement and hard pseudoscientific work; the 1960s and 1970s saw a rise in popularity of soft methods, catalysed through developments in family and group therapy; since the 1980s, mixed models combining hard and soft methods have become more important (Clarke, 2001). The aspect of learning not only of the individual but of groups and entire organisations has been considered to be central since at least the early 1990s, often in connection with technological innovations (Edmondson, 2008).

Today's organisations employ a wide spectrum of organisational interventions. At one end of this spectrum lie strategies that emphasise measurement and sustainability and often focus on the single process or the individual as part of a process – like the balanced scorecard (Kaplan and Norton, 1996). At the other end lie methods that look at the whole system or groups and borrow more heavily from therapy and the performing arts – like improvisational play (Ferris, 2002). System constellations can be found at this latter end, too. They target group rather than individual behaviour, target multiple goals and can be used both for diagnostics and for strategic interventions. They are also determinedly phenomenological in nature: in a constellation, different patterns of behaviour can be identified, but no effort is made to relate them to, or derive them from behavioural theories (Edwards, 2001).

Repeating patterns that are visible during different constellations have nevertheless been identified

and are called principles. They represent good organisational practice in the sense that issues of organisation systems can often be understood in terms of violations of these principles. When an intervention in the form of a constellation is tried based on such a violation, the system, or rather its present or representative members, respond with relief, and solutions can be found which seemed elusive at first.

The organisational behaviour literature distinguishes a number of different types of intervention by target, including: structure, leadership, management, supervision, communication, goals/roles, people development, interpersonal and personal issues (Dick and Ellis, 2005). Table 2 shows a comparative matrix including the basic setting for each case study – company size and type, number of participants, group type – goals of the intervention, and main outcome facilitated through the constellation. The matrix shows that constellations – judging from these case studies – are useful to facilitate improvement in the areas of leadership (A), goals/roles and management (B), inter/personal issues and decision-making (C) for large multi-national companies as well as for national SMEs, while the group size was of the order of 10 participants in all cases. The method worked both when all representatives came from the same company, and when the representatives were not from the company at all². Especially in companies A and B we also found that the communication between the participants improved dramatically.

A comparison with the claims made above („Purpose of constellations“) shows:

- 1) in company A, the original situation prior to the constellation work presented itself as organisational defensiveness of a group of managers. The constellation led to a clarification of a number of leadership issues, which eased the communication among the management team members and made further strategy work possible.
- 2) in company B, relationships between team members had been disrupted largely because of systemic issues with goals and roles (e.g. customer relationship and responsibilities), which the participants had inherited from the company. The constellation work enabled them to create a positive team situation and define a project with a high synergy potential (a management task).
- 3) In company C, hidden truths about the relationship between the business owner and one of the bidders (inter/personal issues), and between her and her father, could be made visible leading to a fast decision-making process and a successful close of the deal (management).

2 That all representatives except the client are outsiders to the company is the standard case in organisational constellations practice.

Case	Company Size/Type	Participants (+ facilitator)	Group Type ³	Intervention goals	Constellation outcome
A	large/multinat.	13 +1	G	Leadership, communication, goals/roles	Leadership, communication
B	medium/national	12 +1	T	Communication, goals/roles, management	Communication, goals/roles, management
C	small/national	10 +1	R	Management, inter/personal issues	Management, inter/personal issues

Table 2: Comparative matrix of constellations in case study companies A, B, C

CONCLUSIONS

Changes at any level and to any end in an organisation can meet with defensiveness, because some or all members of the organisation might find it threatening. This defensiveness, which a psychotherapist might call „resistance“, freezes the actors and the organisation to the point that no further learning is possible and successful change is in danger. Organisational constellations have been shown to be an effective tool to overcome these defensive routines, while at the same time representing a deutero-learning process using higher-order systemic thinking, which allows managers to be both participants and observers of a system.

Because of the increasing popularity of this method among businesses there is ample opportunity for further research into organisational constellations. Questions of immediate interest and high relevance to the practitioner include: (1) what are the long-term consequences for the organisation? (2) Can constellations provide sustainable improvement and change in an organization; and (3) how is group learning facilitated through a constellation?

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³ We distinguish G = group of participants from the same company, T = team of participants, and R = group of representatives which are not part of the company which was constellated or to whom the client belonged.

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