Shifting from external to internal brokering: observations, lessons and practices for survival

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Acknowledgements
I acknowledge the Bunurong and Boonwurrung people of the Kulin Nation who have cared for the land, sea and sky that I get to live on since time immemorial. I pay my respects to their Elders and acknowledge that sovereignty was never ceded. This land always was and always will be Aboriginal Land.

I want to thank the many collaborators I worked with as I journeyed through the accreditation process. In particular, I want to thank my mentor, Rita Dieleman, for the patience and space she provided as I navigated this new space, and for helping me to think in colours again.

This paper is dedicated to a courageous, positively outrageous and exceptionally dedicated leader whom I was fortunate to have collaborated with and learned from during my first internal brokering role. Devastatingly, I learned of her passing at the time of writing this paper. Vale Deb Ganderton.

Positionality Statement
I come to the practice of partnership brokering shaped by early experiences of power as threat. Growing up in North Queensland, Australia, in contexts marked by violence and racism, taught me to read power dynamics closely.

As a first-generation high school and university graduate now working as a consultant, I hold formal authority that I often struggle to claim. I tend to position myself inside collaborative groups rather than above them, which reflects both a belief in non-hierarchical practice and discomfort with my own power. My focus on and bias toward shared and lateral power come from facilitation work with lived experience groups and learning from non-Western ways of being, rather than academic theory.

I stand against concentrated power and wealth, and identify more with people trying to change systems from within than with formal leadership. These stances likely make it harder for me to see my privilege as a white middle-aged woman who has benefited from Australia's colonial past. This accreditation process examines my own practice alongside others', with the understanding that what allows me to notice power dynamics others miss can also be a blind spot. I need better accountability structures to help me see when I'm not recognising the power I hold.

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Introduction

Embarking on my first project as an internal broker, I was excited by the opportunity to explore and expand on my experience. I had already held various external brokering roles, and I was confident that the skills I had developed were highly transferable. Despite the emphasis given to the vast differences between internal and external brokering in the PBA's training program, I will admit that it was those differences that took me most by surprise.

I learned that internal brokering is a delicate balance of art, science and survival. It requires zooming out to plan and act on strategies as a broker to the partnership, while simultaneously zooming in on the details to make your contribution as a member of that partnership. Some of the specific challenges I faced include:

- Holding a degree of accountability for the success of the partnership but relying on others in the organisation to make important decisions about it.
- Struggling to move groups through periods of stagnation or conflict because, as a member of the partnership, I was a part of that stagnation or conflict.
- Feeling alone in the role. While everyone had a clear role to play in the partnership, mine felt like it came with the baggage of an additional role, the broker.

This paper is for all the internal brokers whose experiences resonate with the challenges above, as well as those beginning this journey themselves for the first time. The reflections in this paper are largely based on my experience leading a complex consultation and engagement process for the master planning of a new state-significant development on public land in Naarm/Melbourne, Australia. The project involved a consortium of architects, landscape architects, urban designers, economists and First Nations engagement experts (among others). I undertook internal brokering activities in several contexts: internally, across the consortium, and externally with new partners.

There are three parts to this paper, each offering an area of exploration for internal brokers:

- Part One: Collaborating to level up your internal brokering skills
- Part Two: Facilitation modes for moving through conflict and stagnation
- Part Three: Sharpening the efficiency of your brokering activities

Additionally, I have included practical reflections on how Patrick Lencioni's *5 Dysfunctions of a Team* and the associated model (Figure 1) have been a source of inspiration and helped me recognise that investing time to collaborate with intent helps to achieve results, find focus when helping a group to move through stagnation or conflict, and rapidly diagnose the status of a partnership and take action.

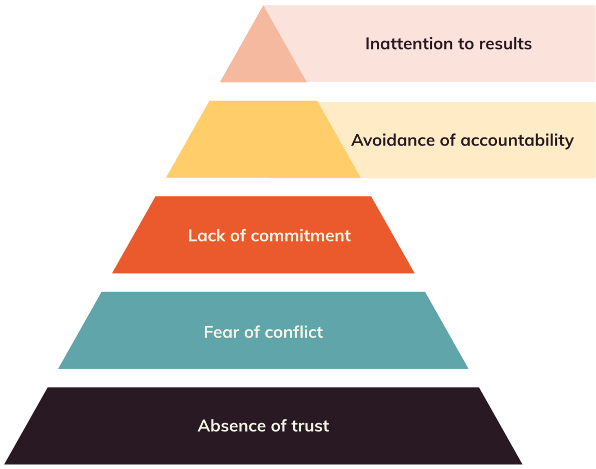

Figure 1: Adapted from Patrick Lencioni's 5 Dysfunctions of a Team[1]

[1] Source: The Table Group - https://www.tablegroup.com/topics-and-resources/teamwork-5-dysfunctions/#5dmodel.

1. Collaborating to level up your internal brokering skills

One of the most common topics of conversation with my mentor during my experience as a first-time internal broker was intentional collaboration. Yet, I felt a strong reluctance when it came to collaboration. Perhaps it was a hangover from having spent the last four years microscopically managing time to the minute and feeling frustrated by having to justify any 'superfluous' activity (like collaborating with others) as a management consultant, or guilt that came with asking others to work with me on a brokering activity, knowing that they had their role to play in the partnership. There is still exploration to do here, but what I do know is that when I began to collaborate with intent, an entirely new world unlocked. It felt like my brain, which had been taught to think in grey during those consulting years, was suddenly thinking in colour.

As partnership brokers, peer collaboration provides a great opportunity to develop your practical skills post-training. Working with peers can introduce you to new models and mindsets, and provide a rare opportunity to learn and reflect with others who understand the unique challenges you may have faced. Designing and facilitating brokering activities with others also encourages the distribution of risk and accountability within a partnership. Collaboration of this kind might involve working with a colleague in advance of a workshop to test and clarify the aims of the session together, or it may involve working with unfamiliar counterparts with entirely different approaches to yours to build on and amplify each other's skillsets.

I was recently asked to deliver a capability-building workshop for a new Executive Team. I knew that the workshop needed to cover both their capability as individuals and their capability as a leadership team in an organisation. I had worked a lot with teams in the past, but I had never worked on an individual level before. When the opportunity to collaborate with another facilitator who specialised in one-on-one coaching arose, I felt both apprehensive and excited - apprehensive because I have always felt nervous when facilitating in front of peers and excited because I wanted to learn about something new. The client asked us to each deliver a 0.5-day session. The intent was that by combining the two separate sessions, we could create a full-day workshop for the team. This seemed like a clumsy way to bring two different parts of an important puzzle together and didn't feel like a genuine collaboration. Knowing it would result in more preparation work and feeling vulnerable about working with an unknown facilitator, I took the brave step of suggesting that rather than each running two separate sessions, co-facilitate a full-day program that weaved our strengths together.

Guided by the Lencioni model, we prepared by engaging in curious conversation over a drink and learning about each other's strengths and weaknesses. It took a while to clarify our respective roles because we each shared similar goals for the workshop but were coming at them from different theoretical bases (my design thinking perspective and their coaching background). We asked each other what we could each uniquely bring to the table and followed up the answers with a lot of 'whys'. We decided it would be important to address role clarity upfront with participants to help to set expectations about how they might experience the workshop. We prepared the agenda together based on what we learned, and then divided and conquered on preparation. We met several times before the workshop to run through the plan and clarify details together.

On the day of the workshop, we set participant expectations for the day by sharing a diagram that explained how we would co-facilitate the day. The diagram showed that when participants were working with my colleague, they would be focused on building their skills as individuals, and when they were working with me, they would be working on organisational capability as an Executive Team. Because we were expecting a high degree of collaboration from the group, the co-facilitator also made a pact to model collaborative behaviours: drawing on each other for examples and explanations, validating each other's perspective, participating in activities the other had planned, and dividing practical duties like screen sharing and breakout room management.

The result was a rich and dynamic session. Participants did not have to listen to one voice for four hours straight, and they had the opportunity to learn in each session from two unique perspectives. They knew to expect those perspectives to be brought in, so there was no confusion when it happened. Participants thanked us at the end for taking them through "one of the most engaging online sessions they had been a part of".

Collaborating with trusted allies to test and adjust partnering approaches before important events is another way in which you can level up your skills. By inviting others to challenge and contribute knowledge, you can diversify your approaches and surface any underlying assumptions or biases. By testing concepts and language (particularly those that might be divisive) before you present them to unfamiliar audiences, you might also mitigate potential reputational risks to the partnership. Building external support through trusted allies can also provide a basis of trust before you even engage with a new potential partner.

I was recently tasked with working with a colleague to begin the process of testing concepts for the master plan. The concepts challenged traditional views on how an essential service to the public should be delivered, and while the ambition was well supported within the organisation, it was untested with external stakeholders. To say that our first attempt to test the concept externally was problematic would be an understatement. Particularly as the audience was a crucial partner in the successful implementation of the ambition. Instead of fostering a sense of shared vision (as planned), the presentation was received as a challenge to individual values and belief systems. Some of the language used created a strong divide. The individuals in the group justifiably felt threatened and were unable to engage in constructive dialogue. While it is easy to understand why, in retrospect, it was a 'deer in the headlights' moment at the time. With several of these engagements remaining, I knew I had to change tactics.

I was comforted by Ros Tennyson's wisdom in "Choosing our Words with Care"[2] and the importance of paying attention not just to the act of listening as a broker, but also to the act of speaking. In the lead-up to our second attempt, I engaged with a trusted contact who had witnessed the first presentation and sought their perspective on the experience. I asked: *"What worked well? What could be improved? What was missing?"* They offered suggestions about what might be missing and where the emphasis could be shifted in the presentation of the concept. I also reached out to a trusted contact who I knew would be part of our second audience and shared with them the planned approach. This time I asked: *"With your knowledge of this group, what would you change?"*.

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[2] Tennyson, R., 2013. Choosing our words with care. *Betwixt & Between: The Journal of Partnership Brokering*, (1)

These simple actions of collaborating with the intent to test an idea led to an entirely different second experience for two reasons. First, the contact I had reached out to in advance offered to introduce our presentation as a trusted member of that audience before we presented. With their endorsement, we also had the trust of the group and a license to engage on uncomfortable topics. Second, on advice from the first trusted ally, I decided to revise my presentation to address upfront how the concept about to be presented might challenge their own beliefs, but why it was an important conversation to have. This helped to elicit and acknowledge any conflicts from individuals early and paved a path to move into a shared dialogue focused on the opportunities as opposed to the challenges. As a direct result of collaborating with trusted allies to test our proposition before presenting, we were able to engage in open and constructive dialogue without compromising on the vision to meet individual interests.

In her 2013 paper[3], Judith Nichol argues that building emotional capital in a partnership is just as important as human, intellectual and financial capital in giving a partnership the best chance to flourish. As a first-time internal broker, I experienced a heightened awareness of this argument throughout the collaborations I embarked on. At its heart, collaborating requires trust. The Lencioni Model demonstrates that when you start with trust, you ultimately bring focus to achieving results (refer to Figure 2 below).

Figure 2: Trust leads to Results - adapted from Patrick Lencioni's 5 Dysfunctions of a Team.

[3] Nichol, J., 2013. The Power of Emotional Capital in a Partnership. *Betwixt & Between: The Journal of Partnership Brokering*, (2).

2. Facilitation modes for moving through conflict and stagnation

As a practitioner with a strong action bias, my facilitation style can be direct and challenging. I began my role with the masterplan client just as their governance structures were being established. I remember in my first few meetings observing a distinct lack of momentum in the project. My response was to put on my action-oriented facilitator hat and apply force. In doing so, I was met with unexpected behaviour. The group turned away from me and ignored my attempts to guide the conversation. I remember the frustration upon hitting the leave call button the first time this occurred. My inner dialogue was playing the blame game: pointing to unprofessional behaviour and a lack of respect.

After a calming and wise conversation with my mentor, I took a deep breath, left my ego at the door, and reflected: "*Is it possible to still achieve results by taking a less active facilitation role?*" What I learned through the trials and errors that followed is that if the partnership you belong to is stagnant or struggling through conflict, you, as an internal broker, are not just there as a facilitator to move people through it. You are also a part of that stagnation or conflict and you need to understand how you're contributing to it and adopt a mode of working accordingly. From this experience, I developed and refined the model below (Figure 3). It is intended to help with rapid diagnosis and provide strategies for moving groups through stagnation and conflict using both active and passive facilitation modes. I am sharing it and the suggested key moves below in the hope of testing and refining it with other brokers.

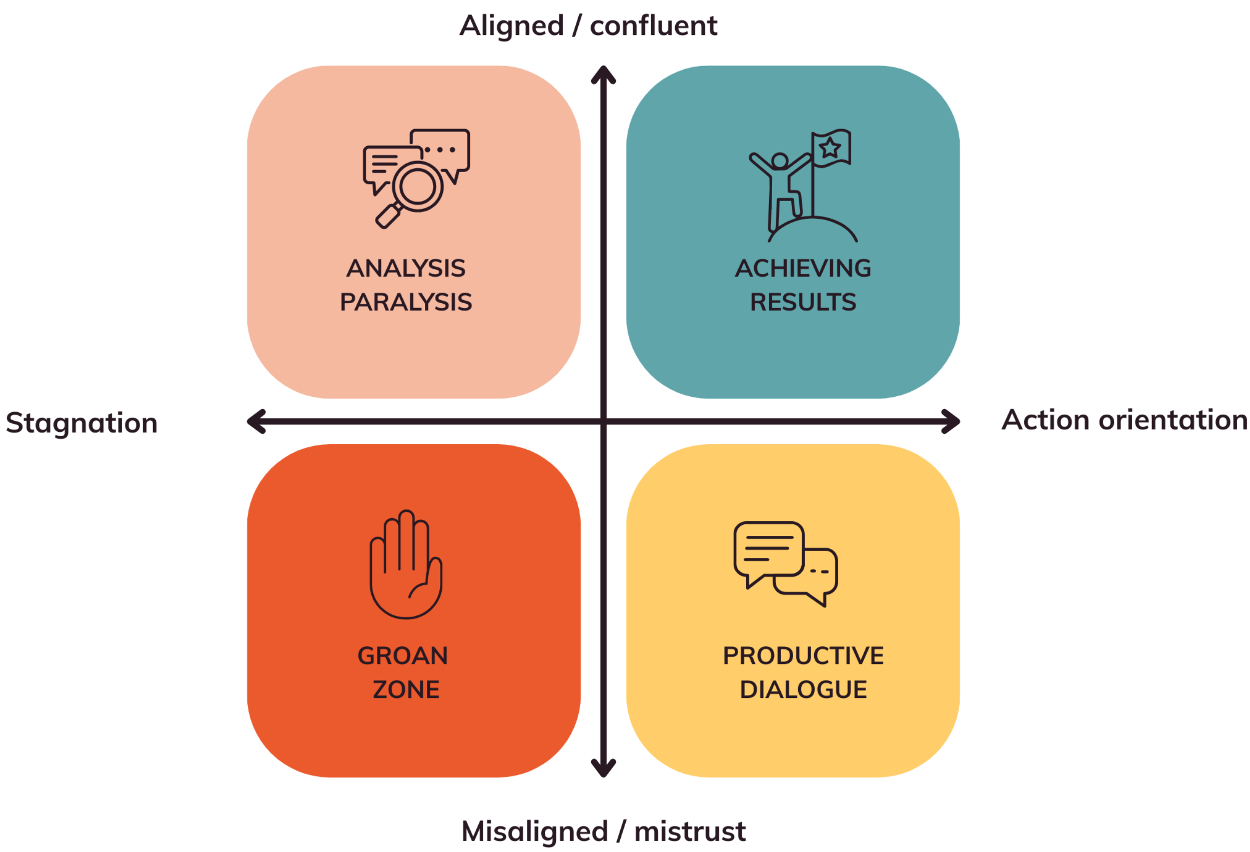

Figure 3: Moving through stagnation and conflict: a group diagnostic model

Moving through Analysis Paralysis

If a group is relatively confluent but talking a lot and not doing much, you may want to consider playing the role of an **Observer**. An Observer may set an agenda and outline the objectives of a meeting, but they will let the conversation lead itself. Instead of directing, they listen actively, and they look for patterns or common threads. At an appropriate time, they'll play their observations back to the group and encourage the group to use those observations as a basis for determining action to take. In Atlas of the Heart, Brené Brown describes the skillsets required by this type of role as "Practising the Courage to Walk Alongside" and "Practising Story Stewardship". She talks about "Cultivating meaningful connection" by practising non-judgement, being relational, setting and respecting boundaries, listening, discovering, and staying curious (among others).

An Observer Role may help shift a group from the Analysis Paralysis quadrant to Productive Dialogue or even to Achieving Results. For example, when I play the role of an Observer I often have a whiteboard set up and visible to the group. I listen and note actionable ideas. I cluster and consolidate the ideas as the meeting progresses, and at the end, I share this back. I have found that this works to create collective buy-in on the action to be taken, and in line with the Lencioni Model, encourages greater accountability for actions.

Moving through the Groan Zone

If a group is divided and stuck in an unproductive conversation, you may want to consider playing the role of a **Strategist**. A Strategist focuses first on building trust to set the necessary conditions for moving through conflict. Strategists take the time to observe behaviours both in group and individual settings. They ask questions to uncover individual values and interests and seek to understand how those values and interests sit across the group. Only then do they consider taking action. When they act, it is targeted toward key areas of difference in the group with an aim to surface productive conflict.

A Strategist may effectively direct a group from the dreaded Groan Zone quadrant towards Achieving Results through Productive Dialogue. For example, I recently collaborated with an exceptional leader in planning an engagement with a Board to seek their crucial decision to progress an aspect of the master plan project. I shared with this leader my planned approach and observed them shift immediately into a Strategist role. They had spent a lot of time understanding the individual interests and values within the Board. They meticulously considered how each member of the Board would receive the presentation. They identified the potential pinch points and conflicts that would necessarily surface. They then broke this analysis down to two specific areas of advice as follows:

"For those who are risk-averse, you need to walk in having done the research; they will want to see examples. For those who are already behind the vision, you need to provide an opportunity to shape the work. Don't go in with it already complete. They will help you gain the trust of the others in the room".

The presentation that followed did create an ideological debate, but it was founded on trust and allowed us to co-create a clear set of principles to move the process forward that everyone had a role in shaping.

The experiences described above tell me that yes, it is possible to achieve results by taking a less active facilitation role, but it's important to understand that your role in the stagnation or conflict may require you to shift between active and passive different modes of facilitation at different times.

3. Sharpening the efficiency of your brokering activities

A unique characteristic of internal brokering is the requirement to balance brokering activities against the demands of daily work. While an external broker has the (perceived) luxury of undivided focus, an internal broker is constantly zooming in and out between the bigger picture partnership goals and their specific jobs to be done within the partnership. So how do you know where to place effort when faced with such a delicate balancing act?

As a natural strategic thinker, my tendency as an internal broker is to resist the minutia of daily work and focus on the bigger picture. It satisfies the ego and allows me to skirt above areas that are outside of my comfort zone (like the detail). In my most recent experience as an internal broker, this played out by me studying the project program, meticulously preparing for conversations about the partnership vision, objectives and ways of working, and becoming a self-appointed custodian of the big picture project knowledge. It was perfect, exactly what I imagined. I felt safe. I had a lot to contribute to every conversation, and when things got too detailed, I simply assumed my role as a 'broker', and unintentionally neglected to be 'a partner'.

As time passed, a deep dependency within the partnership emerged. My colleagues relied solely upon me to hold the knowledge and share it with the right people at the right time. There was no shared accountability for the project goals. What felt great at first was now a heavy burden. The partnership was building momentum, the daily work had picked up, and I could no longer procrastinate my way out of engaging with the detail. It was like trying to maintain two jobs at once. Details were missed, and I wasn't prepared for the big picture conversations either.

About this time, my mentor introduced me to Stafford Beer's *Viable Systems Model*[4] as a tool for assessing the strengths and weaknesses of a partnership or, in this case, my contribution to that partnership. By working through the various functions required for a system to be viable, we were able to identify that it was communication and connection that required my focus. I had to find a

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[4] Espejo, Raul & Gill, Antonia. (2011). The Viable System Model as a Framework for Understanding Organizations. https://www.researchgate.net/publication/265740055_The_Viable_System_Model_as_a_Framework_for_Understanding_Organizations.

way to transfer the knowledge I was holding to a medium that others could access and contribute to. My key reflection here is that the more efficient you can get with your brokering activities, the more effectively you can balance your efforts in both brokering and day-to-day contributions to the partnership. From this, I can offer two lessons for improving the efficiency of your partnering activity.

First, establish a common platform right upfront at the start of a partnership where all shared knowledge can be kept and where others can contribute as the partnership progresses - this might include elements such as a project timeline, agendas and minutes from key events and activities, and a record of decisions. By doing so, you negate the need for a custodian of knowledge and instead promote shared accountability for the big picture in the partnership. There is a growing practice of brokers who recognise the importance of information equity. In a 2014 paper[5], Brad Henderson expands on the importance of building a shared understanding of the job to be done by the partnership and discusses the use of 'mind maps' and graphical mapping in doing so. He also suggests utilising a theory of change as a shared resource for the partnership.

Second, use tools that help you to rapidly diagnose the overall status of partnerships. These tools can guide a broker's response to a partnership dynamic based on key traits rather than starting from scratch to design a tailored response each time. Examples of these tools include:

- The Partnering Initiative's *Relationship Spectrum*[6], or the Partnership Brokers Association's *Partnerships or Transactional Relationships diagram* (refer to Figure 4 below)[7], which I have used to assess the degree of collaboration a partnership possesses against the degree of collaboration required to achieve partnering goals.

Figure 4: Adapted from PBA's 'Partnerships or Transactional Relationships?' diagram

- The *Viable Systems Model,* which I have used as a facilitation tool with partnerships to help them to self-assess their strengths and weaknesses using systems thinking.
- The Lencioni *5 Dysfunctions of a Team Model,* which I have used to identify areas of challenge within a partnership and plan to address those challenges. For example, if you observe a lack of accountability within the partnership, Lencioni's model would suggest that you might want to think about the next layer down in the pyramid: creating collective buy-in.

Navigating the role of an internal broker can be challenging, but it is possible to achieve balance. Clarifying your contribution to the partnership and sharpening the efficiency of your partnering

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[5] Henderson, B., 2014. Complexity and Partnering: Learning to 'see' for more effective brokering. *Betwixt & Between: The Journal of Partnership Brokering*, (3).
[6] Source: The Partnering Initiative - https://www.thepartneringinitiative.org/wp-content/uploads/2018/12/The-Relationship-Spectrum.pdf
[7] Source: PBA Partnership Broker's Training Package.

activities are important strategies to ensure that you can focus efforts where they can deliver the most value to the partnership.

What I learned by writing this guide

Internal brokering is equal parts challenging and rewarding, particularly when it comes to the balancing act, but what other role offers us such breadth and depth of thinking? It can be lonely, but there are always others to collaborate with, and when you collaborate with intent the potential for personal and professional growth is exponential. It can feel challenging in stagnation and conflict when you feel the weight of obligation to fix it. Go bravely knowing that as a growing network of practitioners, we can find ways to share and learn from each other's experiences. Finally, tap into this knowledge and find efficiencies in your brokering activities when you can. In doing s,o you create space to invest in the foundational work that matters. Time and effort spent on building trust and creating safe spaces for conflict will result in an abundance of action and impact.