

## **The Tightrope Between Coaching and Consulting: Role Clarity in Internal Organizational Practice**

**Peter Rubarth**  
**Berlin, Germany**

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### **Abstract**

This case study examines the consequences of unexamined role duality when an internal practitioner simultaneously occupies coaching and organizational development consulting positions within the same client system. Over eighteen months, the author worked inside a medium-sized technology company as both a coach to a newly appointed director and an organizational development advisor designing governance structures the director was expected to implement. What initially appeared as a productive integration of complementary roles gradually produced structural blind spots, eroded trust, and culminated in a crisis that threatened both the organizational transformation and the practitioner's professional position. The case traces how role ambiguity shaped stakeholder perceptions, restricted information access, and made professionally neutral action structurally impossible. Drawing on systemic organizational theory, the consultancy spectrum framework, and literature on internal coaching, the analysis argues that dual roles in internal practice are not inherently problematic but become dangerous when left unexamined. Recovery required structural interventions – separating roles visibly, formalizing mandates, and rebuilding relational access through demonstrated independence. Four lessons for practitioners are proposed: unexamined dual roles create structural blind spots; role clarity is a structural intervention rather than a personal quality; dual roles should be contracted explicitly; and sometimes the dual role should be declined. The case concludes with a reflection on the limitations and value of practitioner case writing as a form of professional development.

*Keywords: role clarity, internal coaching, organizational development consulting, dual roles, systemic practice, practitioner case study, role ambiguity*

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### **Introduction**

What happens when the same person coaches a leader through a difficult transition and designs the organizational process that leader must implement? When the coach is also the consultant, and the consultant is also the coach – and neither role was explicitly contracted?

This case study examines the consequences of unexamined role duality in internal organizational practice. Over eighteen months, I worked inside a medium-sized technology company as both a coach to a newly appointed director and an organizational development advisor shaping the very structures he was expected to lead. The two roles felt like a natural extension of each other – until a crisis revealed that their combination had created the structural conditions for a trust conflict that nearly derailed the transformation and my professional position within the organization.

The central argument of this case is not that dual roles should be avoided. In internal practice, role combinations are often inevitable and sometimes productive. The argument is that

unexamined role duality carries specific, predictable risks – and that making these roles explicit, to oneself and to the system, is a prerequisite for navigating them effectively.

Hawkins and Smith (2013) describe a ‘consultancy spectrum’ ranging from process facilitation to expert guidance. Most accounts of this spectrum treat it as a range of behaviors the practitioner moves along as needed. This case suggests something more uncomfortable: when a practitioner occupies multiple positions on that spectrum simultaneously, without explicit acknowledgment, the resulting ambiguity becomes a systemic problem – not just a personal one.

### **The Engagement – Two Roles, One Person**

The organization was a medium-sized technology company experiencing the tensions Greiner (1998) describes as a crisis of autonomy approaching a crisis of control. It operated within a formalized self-organization framework with explicit governance processes, prizing decentralized decision-making and maintaining the unofficial motto: ‘no titles, just roles.’ An intermediate management layer of directors had recently been introduced to address coordination challenges that the flat structure could no longer absorb. This represented what Heifetz and Linsky (2002) would classify as an adaptive challenge – requiring shifts in values and relationships, not merely new procedures.

I entered this system as an agile coach for a department of three teams. My initial mandate was clear: support the teams in their agile practices and effectiveness. But as I worked with the teams, their leadership, and gained an overview across the organization, I identified a significant gap: there was no coherent alignment process connecting team-level activities to organizational priorities. A few months after the directors were appointed, this diagnosis led me to propose a structured goal-setting process. The proposal seemed like a logical next step – the teams were already engaging in some form of planning, just with significant variations and without meaningful coordination. It was also the moment my role fundamentally changed, though I did not recognize it as such at the time.

**The consulting role.** By designing the goal-setting process, I was operating as an organizational development advisor. My approach was informed by systemic organizational theory in the tradition of Luhmann, particularly as developed by Simon (2007), which attends to the communicative patterns and decision premises that shape organizational behavior. The practical framework drew on product-oriented management thinking, emphasizing outcome alignment over activity management. My task was to streamline existing scattered planning activities into a coherent process where team goals would be developed collaboratively but approved by the director – something entirely new in an organization where such approval had never been required.

**The coaching role.** Simultaneously, I was the director’s primary thinking partner. We maintained regular sessions – not strictly coaching in the traditional sense, but reflective working conversations about the challenges of leading a major transformation. My coaching practice was grounded in systemic approaches with a solution-focused orientation: attending to patterns, relationships, and the observer’s own position within the system. The intimacy of this role gave me access to the director’s thinking, doubts, and strategic intentions that no one else in the organization shared.

**The overlap.** These roles felt complementary. The coaching conversations informed my organizational design; the organizational design created context for the coaching. But what felt like productive integration created a structural problem I could not see from the inside: I was simultaneously the architect of a contested process and the confidant of the person implementing it. To the teams experiencing the changes, these roles were not distinct. They saw one person – closely aligned with their director, designing structures that constrained their autonomy.

What Clutterbuck et al. (2016) identify as the distinctive challenges of internal coaching – navigating pre-existing relationships, organizational politics, and the tension between impartiality and alignment – were compounded by the fact that I was not merely coaching. I was also the consultant whose work the coaching relationship supported. The roles fed each other in ways that were invisible to me but increasingly visible to the system.

### **The Collision – When Roles Create Conflict**

The months following the introduction of the goal-setting process illustrated how gradually roles blur and how structural consequences accumulate before becoming visible.

The process was functioning but generated low engagement. Participants experienced it as a burden rather than something they owned. We tried various approaches to involve them in improving it collaboratively; these mostly failed. I attributed this to a general organizational pattern of low engagement across many topics – not recognizing it as a signal about how the process, and its association with the director and me, was being perceived.

What I also failed to see was a critical shift in how the process was experienced at the team level. The director's predecessor had been lenient – offering feedback on team goals but not insisting on changes. This director challenged team leads' proposals more directly and insisted on results he was satisfied with. These interactions happened in one-on-one conversations between director and team leads, entirely invisible to me. The interpersonal dynamics were further complicated by the fact that some team leads had previously been peers of the director – a relationship reconfigured by the new structure into one of formal authority. Every friction was amplified by this history. And I was structurally excluded from the information that would have made this visible. My perceived closeness to the director meant I was not trusted with concerns about him. The backstage of organizational life – the gossip, the frustration, the growing resentment – circulated in spaces my structural position barred me from entering.

About five months after the introduction of the goal-setting process, the tensions surfaced violently. Two team leads confronted the company leadership in a heated meeting: "Do you want to kill self-organization?" The emotional impact was visceral – several were close to tears, describing a profound loss of autonomy and implicit messages that 'you are not good enough.'

What happened next illustrates the role clarity problem with uncomfortable precision. I followed up personally with the two team leads. I took their concerns seriously and promised that their perceptions would inform how we developed the process further. At this point, I was not aware of the interpersonal deterioration between them and the director – I understood their frustration as directed at the process and the structural changes, not at the person. When I informed the director about this conversation, his reaction was surprisingly intense. He

experienced my outreach to the critical voices as taking sides against him. We had a heated exchange – the sharpest disagreement in our working relationship to that point. I insisted that I would not accept limitations on whom I could speak with. We resolved it, but the episode revealed something I had not fully grasped: in a system where my role was ambiguous, every conversation was read as a political signal. Speaking with the director’s critics was not perceived as standard coaching practice or organizational development work. It was perceived as an act of allegiance – or betrayal. The dual role made it impossible for either side to read my actions as professionally neutral, because my position was not neutral.

Around the same time, a major cross-team development initiative was launched that consumed much of my attention. Getting the involved teams to agree on a plan and execute proved genuinely difficult. Roles and ownership were unclear, individual contributors challenged every direction, and progress was slow. Working with the director to develop responses to these challenges felt like my primary task. The goal-setting process appeared to be working, if imperfectly.

But the underlying tensions from the confrontation had not been resolved. Slightly more than half a year after that meeting – approximately one year after the introduction of the goal-setting process – the situation escalated dramatically. Anonymous complaints appeared on a company rating platform, quickly developing into public attacks that labeled the director a ‘toxic leader.’

It was in this full-blown crisis that the role duality became visible in its consequences – to me and to the system. Team members perceived me not as a coach maintaining what O’Neill (2007) calls the essential “third position” but as the director’s “buddy” and “long arm.” This was not a distortion. I had designed the process they experienced as threatening. I collaborated with the director regularly and visibly. Even my attempt to engage with critical voices had triggered a confrontation with the director that reinforced the perception of entanglement. My structural position made the “buddy” label a reasonable inference based on observable behavior, not a misperception based on ill will.

The trust conflict was not caused by the director’s behavior alone, nor by the organizational resistance alone. It was catalyzed by the ambiguity of my role. A coach perceived as independent might have served as a bridge between the director and his teams. But I was not merely a coach – and everyone in the system except me seemed to recognize this. The role duality that had never been made explicit became the fault line along which trust fractured.

### **Navigating the Dual Role Under Pressure**

Recovery required making visible what had been invisible: the role boundaries that I had never articulated, even to myself. I began with what I would call internal supervision – a critical self-examination of how my positioning had contributed to the situation.

The insight that restructured my approach was this: the problem was not primarily behavioral. I had not acted unprofessionally or unethically. The problem was structural. Two roles that served different functions and carried different obligations had been merged in one person without acknowledgment. The response, therefore, had to be structural as well.

**Separating the roles.** The most significant intervention was transferring responsibility for the goal-setting process to a colleague – a newer member of the internal coaching team. She received an explicit mandate to own the technical aspects of the process, with clear stakeholder relationships and defined boundaries. She reported to me, and we established that she would seek advice as needed while I would offer perspectives without directing her decisions. Her main stakeholder was the director.

This formalization highlighted by contrast how undefined my own involvement had been. My role in the process had never been formally mandated or bounded – it had simply grown from a proposal into an ongoing responsibility without anyone, including me, marking the transition. The explicitness of her mandate – what she was responsible for, to whom, and with what authority – made the absence of such clarity in my case retrospectively obvious.

That she experienced similar resistance and pushback from the same sources was paradoxically illuminating: it confirmed that the opposition was directed at the process and the authority structure it represented, not at me personally. But it also showed that role clarity alone does not eliminate conflict – it clarifies what the conflict is actually about.

**Clarifying the institutional mandate.** Working collaboratively with my colleague, I drove governance changes to establish formally that the goal-setting process was a company decision, not a personal initiative of the director or myself. This involved making the process mandatory – something that had never been explicit – and creating formal channels for influencing how it operated. The goal was to correct the impression that the process existed only because specific individuals wanted it.

This work required me to operate from an explicit organizational development role rather than a coaching role. The repositioning from ‘coach who also designs processes’ to ‘OD advisor who also coaches’ may seem semantic. In practice, it changed how my interventions were perceived and authorized. I was now lobbying for structural clarity with an acknowledged mandate to do so, rather than making organizational design decisions from an ambiguous coaching position.

**Rebuilding relational access.** With the consulting role made more explicit and partially separated, I could begin reconstructing what Mason (1993) calls multi-partiality – the ability to engage empathically with multiple perspectives while maintaining an independent position. I deliberately sought out critical voices, employing what O’Broin and Palmer (2010) describe as ‘alliance flexibility.’ I stopped pre-informing the director about my public interventions, creating visible independence. After difficult exchanges, I created space for meta-conversation with the director, developing a working relationship that could accommodate public disagreement without threatening the underlying bond.

**Taking public risks for clarity.** I pushed for clarification of management accountabilities, challenged C-level executives publicly, and advocated for transparency about my own role. These actions carried significant personal risk – I genuinely believed I might be asked to leave. But they served a role clarity function: they demonstrated publicly that I was operating with organizational authority and independent judgment, not as an extension of the director’s

preferences. As Oshry (2007) observes, organizational health sometimes requires disrupting established patterns – including patterns one has helped create.

### **Lessons on Role Clarity**

Four lessons about role clarity emerged from this experience that may be relevant to other internal practitioners navigating similar tensions:

1. **Unexamined dual roles create structural blind spots.** The combination of coaching and consulting was not inherently problematic. What was problematic was that the combination was never made explicit – not to the system, and not fully to myself. The systemic tradition I work in (Simon, 2007) emphasizes that the observer's position shapes what they can observe. My dual position created specific blind spots: I could not see how the system perceived my role because my role had never been articulated clearly enough to be perceived as anything other than 'the director's person.' The backstage information I was excluded from was a direct consequence of role ambiguity, not of personal failings.
2. **Role clarity is a structural intervention, not a personal quality.** What restored my effectiveness after the crisis was not primarily behavioral change – it was structural change. Transferring the process, formalizing mandates, separating roles visibly, creating explicit governance. Heifetz and Linsky (2002) distinguish adaptive from technical challenges; role ambiguity in internal practice is both. It requires changes in contracts and structures (technical) and changes in how the practitioner understands their own position within the system (adaptive). One without the other is insufficient.
3. **Internal practitioners should contract for dual roles explicitly.** If a combination of coaching and consulting is intended – and there are good reasons why it often is – this combination should be named, discussed, and contracted with all relevant stakeholders at the outset. Who knows about both roles? How are boundaries maintained? What happens when the roles produce conflicting obligations? What signals role drift? These questions are easier to address before a crisis forces them into the open. In my case, the role extension from coaching to OD design felt like 'a logical thing and not even a big step.' That feeling of naturalness was precisely what made it dangerous.
4. **Sometimes the dual role should be declined.** This case does not demonstrate that dual roles always work if properly managed. There may be situations where the structural entanglement is too deep to be navigable – where the coaching relationship and the consulting mandate are so intertwined that no amount of contracting can create sufficient separation. Recognizing this before engagement, rather than discovering it during a crisis, is a form of professional judgment that deserves more discussion in the literature. The question is not only 'How do I manage dual roles?' but 'under what conditions should I say: these roles cannot be held by the same person in this context?'

### **Critical Questions for Practitioners**

1. **Can you articulate your current roles to every stakeholder in your system?** If different stakeholders would describe your role differently, role ambiguity exists –

whether intended or not. Is this ambiguity serving the work, or creating unexamined risk?

2. **How was your role combination contracted?** If you occupy multiple roles (coach, consultant, facilitator, advisor), was each role explicitly discussed and agreed upon? Or did additional roles emerge without formal acknowledgment – perhaps because they felt like natural extensions of what you were already doing?
3. **What structural changes would make your role boundaries visible?** Role clarity cannot be maintained through intention and good behavior alone. What would need to change about your contracts, reporting lines, meeting structures, or visible activities to make your different roles distinguishable to stakeholders who are not privy to your internal differentiation?
4. **Who in the system benefits from your role ambiguity – and who is harmed by it?** Role ambiguity is not always accidental. Sometimes it is maintained because it serves certain interests – the flexibility it affords, the avoidance of difficult conversations it enables. Understanding these dynamics is essential for navigating them honestly.
5. **Under what conditions would you decline a dual role?** What would the engagement need to look like for you to say: ‘These roles cannot be held by the same person in this context’? If you cannot articulate those conditions, you may not recognize them when they arise.

### **Conclusion: On Writing Cases**

Writing this case study has made the limitations of the format visible. There is no ‘accurate’ representation of what happened – only my perspective, filtered through selective perception and fallible memory. What I can aim for is factual correctness: events occurred, decisions were made, outcomes can be documented. But the narrative arc that emerges in retrospect creates a false sense of inevitability. Each decision point could have led elsewhere; hindsight makes the path taken look more logical than it felt at the time.

The narrative form compounds this problem. Case studies require a storyline, and storylines suggest causality and coherence that lived experience often lacks. I have tried to counteract this by including misjudgments and moments where I did not know what to do. Multiple perspectives – from clients, colleagues, or other stakeholders – would strengthen future cases, something I have experimented with elsewhere by documenting separate viewpoints and bringing them together.

There is also the practical challenge of confidentiality. Making a case vivid enough to be useful while protecting anonymity is harder than it looks. Every detail added increases recognizability; every detail removed increases abstraction. This tension runs through the entire writing process.

Despite these limitations, writing cases is valuable – perhaps most of all for the author. The discipline of honest documentation forces questions that supervision or peer consultation might also surface, but in a different way: How do I evaluate what I did? What alternatives existed? Where do patterns in my practice reveal areas for development? Cases become a form of

structured reflection and sharing them publicly requires the courage and humility that coaching work demands anyway.

What I would like to see in future case studies – my own or others’ – are situations involving multiple stakeholders with conflicting interests, where political dynamics shape what is possible. I am particularly interested in cases from internal roles, where establishing or maintaining a clean coaching relationship is difficult or impossible, but where there were good reasons to proceed anyway. These are the messy realities many practitioners face, and they deserve more visibility in the literature.

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