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Beware of the Drama Triangle in Client Relationships

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By David C. Knoch, president and chief operating officer, 1st Global

As CPAs and financial advisors, have you ever had this experience when working with clients: a client comes in to see you and you think he is upset with something that he feels is outside of his control. As a financial advisor, you might think this is a reaction to the capital markets. As a CPA, you might think this is due to a change in tax law that has had an adverse consequence for your client. Often in the next point in the conversation, the client tries to assess blame for the situation in which he finds himself; maybe he is even thinking perhaps you have not done enough to shield him from this particular situation. As a great champion of client service, you step up and try to make sure that the client is okay and everything in your power has been done to make the situation better somehow; only some time later you find yourself in the same situation at the beginning of the conversation, with the client perhaps this time, anxious about your most recent advice.

As we think about it more, we may realize that at the times we find ourselves operating at our best, we are not actually helping clients solve problems, but instead helping them achieve their ideal outcomes. The best relationships we have with clients are characterized not by transactional problem-solving relationships, but rather by holistic relationships where we know what really matters to the client in business and in life. While we undoubtedly have clients who walk in the door with a problem that needs to be solved, we are at our best when we shift the conversation from problem to outcome.

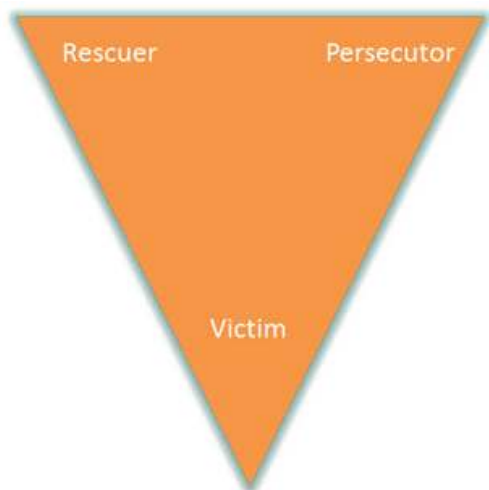
The way the human mind works is that we are often better at reacting to emotion than we are

at reacting to the situation itself. When we focus on a situation, that focus creates an emotional response, and the actions we take are in response to that emotion. We continue working on solving problems, not until we have objective evidence that the problem is solved, but rather until our anxiety is diminished. If you've ever felt as if you keep solving the same problems over and over, it may be rooted in this fundamental view of human behavior. When we are operating at our best and we shift our clients to looking at outcomes as opposed to problems, the emotional response that comes from focusing on outcomes is entirely different. When we focus on outcomes, we are more likely to focus on the passion associated with achieving those outcomes, which makes us much more likely to take a step forward and sustain those steps forward over time.

I recently read an insightful book, *The Power of TED* [1], by David Emerald, which focuses on how these fundamental human dynamics show up in our lives, and therefore in our practice. It's worth reading and will empower you to have better conversations with your clients and loved ones.

The Drama Triangle

In 1968, a doctor by the name of Stephen Karpman developed a psychological and social model of human interaction in an article entitled "Fairy Tales and Script Drama Analysis." Karpman called his model "the drama triangle" and it applies to this discussion nicely. In his model, he outlined three specific roles: The person who plays the role of the **victim**, the person who **persecutes** the victim and the **rescuer**, who intervenes to help the victim.



The **victim** role is one that gets played by someone who feels a sense of powerlessness.

Clients often play the role of the victim if they don't feel like they are being heard or if their objectives aren't being met. Victims feel powerless, overwhelmed or hopeless, and are often unwilling to take responsibility. As a diagnostic tool, one of the best ways to recognize when you, or those around you, are playing this role is to listen for the language of complaint – the hallmark language of powerlessness.

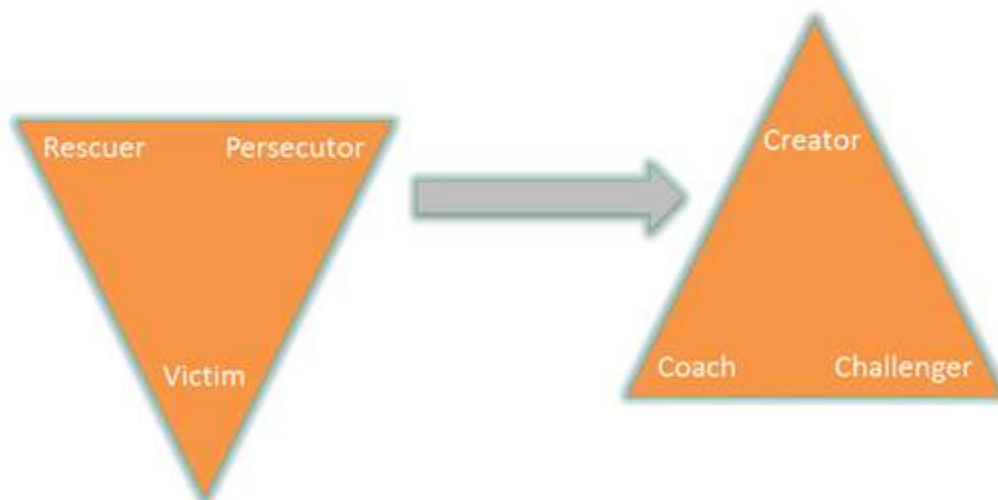
Of course, to play the victim role you need someone (or something) else because it's not a role we play alone. Ultimately, we make the choice to play the victim role. When we feel powerless as victims, we reach out to try to gain our power back, and in doing so, become persecutors.

Victims see many different people or situations as persecutors. If clients are playing the role of a victim, they may see their advisor, their spouse, their family, their job, or the markets, as **persecutors**. Persecutors aggressively blame, criticize and dominate, often feeling self-righteous, defensive or angry.

The **rescuer** role is played by an individual who gets involved to aid the victim. The rescuer is a power-oriented role that continues to place others in a powerless role. This ultimately shifts the rescuer to persecutor over time. The rescuer role is one that is comfortable to CPAs and advisors alike. Rescuers feel needed, responsible, attached, powerful or superior, often shielding others from the consequences of their own actions. When the CPA or advisor becomes more responsible for the outcome than the clients themselves, the shift to rescuer (and victim role for the clients) is made.

Creators, Challengers and Coaches

So how do we stop seeing ourselves as victims? We have to change our mindset. We can make the choice to stop seeing ourselves in the victim role and see ourselves in the role of a **creator**. There's a mental shift that takes place in order to leave the drama triangle. When we make this shift, it is called **the empowerment dynamic (TED)** or the antidote to the drama triangle. To be a creator, you don't focus on problems, you focus on ideal outcomes.



One of the interesting things about seeing yourself as a creator is you can't see yourself as a creator alone. To be a creator, you have to see the world as full of co-creators, full of people who are also trying to achieve their ideal outcomes. The creator is one who develops his or her ideal vision of the future and begins to take steps toward accomplishing it.

In your best relationships with clients, when you're in a **creator** role, you see the client as a co-creator along with you. You're giving something to the client, but you're receiving something in return. You aren't solving problems for clients. Instead, you are helping them achieve their outcomes. Creators feel capable, confident, resourceful and resilient, accepting responsibility and making choices.

A second shift that happens is from persecutor to challenger. The **challenger** role is one that we can ultimately take on with others to help spur them into action to achieve their ideal outcome. We can choose to play the role of challenger by focusing on understanding what other people want to achieve and what their desired outcomes are. By beginning to ask questions and challenging others on their assumptions, we help develop new skills, take on new roles, engage in new activities, all designed to bring about their ideal outcome. The biggest difference between the challenger and the persecutor is perception. When you believe that someone is capable and equal (in his ability to create his own ideal outcome) your tone and content is different than when you feel someone is inferior or incapable. Challengers may still yell and scream, but they do it with a genuine belief in the other. Challengers feel clear, confident, centered and committed and evoke or provoke the will in

others to create.

A third shift and ultimately one of the most important, is the move from the role of rescuer to the role of a **coach**. In the role of a coach, you take on personal responsibility for someone else's ideal outcome. Think about it. In basketball, the coach doesn't go out on the floor to take the final shot; the coach is there to train his team, to make sure they're ready to play the game, to call plays, but ultimately the players have to take the shot. A coach tells stories, motivates and asks questions designed to get the players or other people to discover what they might need to do for themselves to achieve their ideal outcomes.

Just like the switching between rescuer and persecutor, we switch back and forth between coach and challenger. When you're engaged in this model with your best clients, you're switching back and forth between coach and challenger all the time. You're helping to educate the clients, helping them understand themselves, the capital markets, their promises, etc. Coaches feel optimistic, non-attached and feel a sense of contribution, supporting others in tapping into their own capabilities.

Understanding the drama triangle is very important because it appears in all of our relationships. The shift from being a victim to being a creator can have a tremendous impact on our success with clients. You can make that shift by paying attention to the language you use, the language the clients use, and by making a conscious decision to move from one state to the other. Remember, the shift we're making is the way we view ourselves, and through that, the way we view others.

If we really want to be the ideal vision of ourselves and the best possible advisors to our clients, one of the surest ways we can do that is by shifting our orientation away from a victim to that of a creator. When we make that shift, truly wonderful things will begin to show up in our lives and the lives of our clients.

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[1] http://www.amazon.com/The-Power-TED-Empowerment-Dynamic/dp/0977144119/ref=sr_1_1?ie=UTF8&qid=1379608376&sr=8-1&keywords=the+power+of+ted

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