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# The competency of advising in professional social relationships

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## Abstract

This article reflects on the nature of advising (and of receiving advice) in professional work relations. Considered very frequently as “good judgement” or “consumption of wisdom”, advising must be considered as a central competency to different sorts of professionals, namely social workers. The authors argue that this new vision will represent an opportunity to develop social professionals’ skills. The article points out the best practices for giving advice in professional social relationships and how they can improve skilled advising. The analysis suggests the need for: a) a new conceptualization of advising and b) a systematic training of this new competency.

**Keywords:** Advising, competency, reciprocity, work-client relationship, social work.

## Resumo

Este artigo reflete sobre a natureza do aconselhamento (e de receber aconselhamento) nas relações profissionais. Geralmente considerado como “bom senso” ou “sabedoria”, o aconselhamento deve ser considerado como uma competência crucial para diferentes tipos de profissionais, nomeadamente os trabalhadores sociais. Os autores argumentam que esta nova visão representará uma oportunidade para o desenvolvimento de competências socioprofissionais. Este artigo postula as melhores práticas de aconselhamento nas relações socioprofissionais e como estas podem melhorar o aconselhamento especializado. A análise sugere a necessidade para: a) uma nova concetualização do aconselhamento e b) um treino sistemático para esta nova competência.

**Palavras-chave:** Aconselhamento, competência, reciprocidade, relação trabalhador-cliente, trabalho social.

## Introduction

Giving and receiving advice are central competencies on social and cultural professional relationships taking places in different organizations (Wilson al., 2008; O'Leary et al., 2012). Yet, many professionals seldom view them as practical skills they can learn and improve (O'Leary, 2012, p. 2).

Advising is treated as a matter of “good judgment” – you either have it or you don't – rather than a competency to be mastered. And receiving guidance is often seen as the passive consumption of wisdom.

When the exchanges is done well, people on both sides of the table benefit. Those who are truly open to guidance develop better solutions to problems than they would have on their own. They add nuances and texture to their thinking – and research shows they can overcome cognitive biases, self-serving rationales and other flows in their logic. Those who give advice effectively wield soft influence – they shape important decisions while empowering others to act. As engaged listeners they can also learn a lot from the problems that people bring them. And the rule of reciprocity is a powerful binding force: providing expert advice often creates or reinforces the will of the others to be helpful. Correction and reciprocity is the preferred approach. (O'Leary, 2012, Schon, 1983, Ruch, 2010). But advice givers and client/users must clear significant problems, such as deeply inappropriate tendency to prefer their own opinions, irrespective of their merit, and the fact that careful listening is hard, time-consuming work. The whole interaction is subtle and intricate. On both sides, it requires emotional intelligence, self – awareness, restraint, diplomacy and patience. The process can derail in many ways, and getting it wrong can have damaging consequences – misunderstanding and frustration, subpar solutions, frayed relationships and thwarted personal development – with substantial costs to individual and organizations.

Because these essential skills are assumed to emerge organically, they are not taught as they should: but we've found that they can be learned and applied to great effect. So we've drawn on available research (ours and others) to identify the most common obstacles and some practical guidelines for getting past them. We've tried to focus especially on situations that involve risky or emotionally charged decisions and that because professionals struggle with such decisions and must learn to handle them well.

*Why this is harder than it looks.*

Whether giving or receiving advice flawed logic and limited information complicates the process, professionals / practitioners face myriad challenges as they try to interpret messy situations and provide guidance on seemingly intractable problems. And advice seekers must know how to identify their blind spots and how to ask for guidance and overcome an inevitable defensiveness about their own views.

When giving advice professionals/ practitioners must be on the lookout for these tendencies:

*Overstepping boundaries.*

Through many people give unsolicited advice, it's usually considered intrusive (we all know what it is like to be on the receiving side of "helpful suggestions" that have not been invited and are not really wanted). And another way professionals overstep is when they are confronted with some very specialized knowledge but do not want to recognize it. Even a single instance of bad advice normally leads to a rapid decline in an adviser's standing.

*Misdiagnosing the problem.*

Professionals / practitioners must gather intelligence to develop a clearer picture of the problem to be solved. First, they may define the problem prematurely because they *think* they see similarities with challenges they've faced. Second, they sometimes forget that others are self-interested parties who may – deliberately or not – present partial or biased accounts. Taking such accounts at face value leads to inaccurate assessments. All this is a result of an irrational fear of looking incompetent.

*Offering self-centered guidance.*

Professionals often frame their guidance as a "how I would respond if I were you". This approach is both off-putting and ineffective, because there are clearly thinking about how the other person feels, perceives the situation and understands the choices ahead – just the kind of insights that lead to empathic understanding and useful recommendation. Professionals may also be tempted to share personal stories and experiences that fail the "do ability test", because they simply do not accord with the person/client's level of power, negotiation skill, or situational constraints.

*Communicating advice poorly.*

Several mistakes fall under this rubric. Professionals may provide vague recommendations that can easily be misconstrued. Or, when providing specialized expertise, they may use jargon or other inaccessible language. They may also

overwhelm others with too many ideas, plans or interpretations resulting in a non-explicit guidance.

*Mishandling the aftermath.*

Though the final division is not theirs to make, many professionals/practitioners take offense when their guidance is not accepted wholesale. This has both short-and-long term costs: in the moment, lost opportunities to provide a general sense of direction even if some of the client's choices are not to their liking; and over time a growing distance between professional and client that may limit the trust and intimacy that lie at the heart of effective advising. The reality is that users rarely take one person's advice and run with it. More often they modify the advice, combine it with feedback from others or reject it altogether and professionals often fail to treat these responses as valuable input in an ongoing conversation.

On the other hand, in those needing/seeking advices it is fairly common to find some obstacles:

*Thinking he/she already has the answers.*

As people are deciding whether they need help they often have difficulty assessing their own situation, knowledge, or competence. The result is overconfidence. A related tendency is to ask for advice when one's real goal is to gain validation. People do this when they strongly believe they know the solution for their problem but still want to "check the box" with social professionals.

*Defining the problem poorly.*

Users frequently have trouble searching a mutual understanding with their advisers. Sometimes because of improvise or ineffective communication, and sometimes because of cognitive or emotional blinders. When communicating ineffectively, they may tell a lengthy, blow-by-blow story that causes listeners to turn out, lose focus, and perhaps misidentify the core of the problem that needs solving. Or they may omit details that reflect badly on them but are central to understand the real problem. Many people also take for granted background essentials that the professionals don't know.

*Discounting advise.*

A common mistake is to undervalue or dismiss an advice: this is a strong, recurrent finding in social organizational research. Even when people lack expertise they put more stock in their own opinions than in other's views. They become so anchored in their preformed judgements that they can't adjust their thinking when they receive

feedback to the contrary. And overtime, discounting advice can damage important relationships.

*Misjudging the quality of advice.*

Many people who accept advice and help have trouble distinguishing the good from the bad. Research shows that they value advice more if it comes from a confident source, even though confidence does not signal validity. And users also frequently do not embrace advice when professionals disagree among themselves.

All the above tendencies and obstacles, lead us to suggest some best practices for giving (and obtaining) advice.

A professional and a decision maker must “give as good as he gets”, but how to overcome all obstacles? In this paper we have identified some guidelines by combining lessons from academic research with the practical wisdom of experts in the ground.

Five stages for good advising can be found:

*Stage 1: Finding the right fit.* Each request for help and advice is unique, reflecting a distinctive combination of circumstances, people and events. Any professional asked for advice must ask himself if he has the right background to help in that particular situation and if he can dedicate enough time and effort to attend the user’s concerns. Sometimes saying no is a service too and further help can be given by identifying other some of expertise. Even when one is well qualified to serve as an adviser he must consider recommending some other people to bring in complementary or alternative views.

*Stage 2: Developing a shared understanding.*

As an adviser, the professional will want to get a complete idea while also expanding the user’s understanding, all in a reasonable amount of time. So, he must set the stage for openness and efficiency; creating a “safe zone” where conversation can happen openly; hearing the user, allowing his story to emerge with minimal intervention, suspending judgment and resisting the urge to provide immediate feedback and direction. Jumping to conclusions or recommendations typically signals a flawed or incomplete diagnose, so, the more information the better; beginning with broad, open-ended questions because they stablished rapport, uncovering what is truly in the interlocutor’s mind (anthropologists call these “grand tour questions” and suggest using them as a starting point for interviews); determining the user’s personal interest and goals; considering giving “homework assignments”(e.g. come back next week

with three reasons to..., or why...); finally, deepening the own understanding, by inquiring potential consequences and other pertinent issues.

Once the professional has done all that, he will be enough informed to ask himself a key question that is seldom asked: what role should he play?

*Stage 3: Crafting alternatives*

Because decision making improves dramatically when diverse options are available, professionals and clients should work together to come up with more than a possibility. Even go/no-go decisions yield improved results when nuanced alternatives are described and considered.

In this sense, the professional giving help/advice must think himself as a driving instructor. While providing oversight and guidance the ultimate goal is to empower the user to act independently. It is the professional's job to find the path forward. But he can never fully step in the user's shoes and it is important to knowledge that very clearly. The professional must also spell out the thinking behind each advice; describing the principles shaping that advice.

*Stage 4: Converging on a decision.*

The goal of the professional, at this stage, is to work with the advisee to explore all the options at hand before he/she makes a choice. He must assess the relative pros and cans and ensuring that the conversation remains a dialogue rather than a monologue. He also must focus the discussion on a course of action, pausing frequently to evaluate how comfortable the user is with the proffered advice and the extent to which he/she accepts the underlying rationale.

Follow-up meetings are often essential for firming advisee's choices and developing detailed actions plans. So, the professional must make him be available for clarification and elaboration. That said, users sometimes come back for more and more conversations to delay decision making. If the professional suspects that this is happening he must ask what might be done to move things forward, or encourage the user/client to try out a definitive solution.

*Stage 5: Putting advice into action.*

The professional must step back from the process at this stage, reaffirming that it is up to the user to move forward. Both the decision and the consequence are his, not the professional, and must be recognized as such. But the professional must nevertheless

remain open to providing additional guidance as events unfold. Especially in fluid, rapidly changing situations, even the best advice can quickly become irrelevant.

All the above guidelines amount to a fundamental approach.

Although people typically focus in the content of advice, those who are most skilled attend just as much to *how* they advise as to *what* they advise.

Skilled advising and help is much more than the dispensing of wisdom; it is a creative collaborative process – a matter of striving, or both sides, to better understand problems and craft adequate path forward.



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