

Chapter 10

DUAL RELATIONSHIPS AND BOUNDARIES: WEARING MANY HATS

Dual relationships: Having a relationship with a client other than the contractual therapeutic one, such as having a client who is also a friend, family member, or business associate.

Dual relationships—having more than one kind of relationship with a client, such as being friends with a client or trading sessions with a colleague—are practically a tradition in our profession. We almost feel as if we have a right to them. Some of us become indignant at the thought of limiting or eliminating dual relationships: “What! I can’t have coffee with a client?” “My buddy Bill has been coming to me for years, and it’s just fine.” “Where would I get clients if not from people I know?” However, many experienced therapists have discovered that such relationships can be more troublesome than they at first appear.

Dual Relationships: Complicated Dynamics

Dual relationships can seem so easy—it can feel natural to become friends with a likable client. It can seem logical to work with friends and family—who better to share our gifts with than people we already love? However, the confusion of changing roles and the power of transference and countertransference can add complications.

When we try to become friends with Client Carrie, who knows you only as a selfless, always-caring massage therapist focused solely on Carrie’s needs, it may be hard for her to get used to you as a regular person who is sometimes grumpy, insensitive, or needy herself. Or when Big Sister Samantha, who knew you when you were throwing baby food on the floor, becomes Client Samantha, she may have trouble taking you seriously and viewing you as a competent professional. With dual relationships, each person must shift back and forth between an existing role and a new one, and the transition is not always smooth. More often than not, it is messy and can lead to misunderstandings and stress in our practices.

Here’s an example:

A massage therapist decided to barter with an old friend—she would give him massages, and he would paint her living room. He wasn’t a

professional painter, but she thought he could do a good job, and he was willing to do the exchange.

As the work progressed, she became unhappy with both her own behavior and the painter's. They both began treating sessions like social visits. She found herself talking about their mutual friends or her own concerns during sessions. His behavior was equally casual—he usually showed up late for his massage appointments and then made business calls on his cell phone before getting ready for the session. Because he was a friend, she had a hard time asserting herself about his loose time boundaries.

To make matters worse, she was unhappy with the quality of his painting work. When he'd finished the living room, she told him that she felt his work was inadequate. He was surprised and offended and only reluctantly repainted part of it. She ended up feeling dissatisfied, he felt offended, and their friendship suffered.

We can't know all the reasons for this unhappy outcome, but it was no doubt complicated by the effects of transference. The painter said later that he had become accustomed to seeing his friend as the nurturer. He had come to expect her to take care of him, forgetting that he had an adult responsibility for his side of the bargain. He then felt hurt when she criticized his work. When we are switching roles, the effects of transference and countertransference can create confusing situations.

In this story, we also see examples of two problems that are discussed later—how easy it is for both parties to be casual about framework when we are working with friends and the difficulty of **bartering** services or doing **trades**, especially with someone who is not trading his or her own professional services.

Many experienced practitioners stay clear of dual relationships because of the built-in problems. Whether we're trying to turn a client into a friend, doing a trade, or any of the other possibilities, both sides can end up feeling shortchanged.

Common Problems with Dual Relationships

Here are the most prevalent kinds of dual relationships and how they can be problematic.

Becoming Friends with Clients

It's not unusual for clients to want to become friends with us. Clients feel the heart connection in our work and want that connection to extend outside

Bartering:

Exchanging a manual therapy session for goods or services other than another manual therapy session.

Trade:

Exchanging a manual therapy session for a manual therapy session with a colleague.

sessions. We may feel the client's affection toward us and mistakenly think that affection should be carried into our daily lives rather than remain as part of the professional relationship, where it belongs. Or perhaps we find ourselves really liking a client and wanting to build that into a friendship. Despite those feelings, it's often a mistake to try to change the therapeutic relationship into a social one.

The effects of transference can make it hard to ever have an equal relationship. Because clients often give more weight to what we say and do, it may be unrealistic to expect them to adjust to the normal give and take of a friendship. On some level, clients usually have difficulty seeing us as real people with flaws and our own concerns. Even outside the office, they may expect us to be always focused on their needs, as we are during a session. There is also a chance that they would always see us as better or wiser than they are and that we would exploit that in some way.

Socializing with clients should occur rarely, if at all. Feldenkrais instructor Paul Rubin says, "If you're finding a number of friends through your practice, something is out of balance. Whose needs are being met?"

There is also the possibility that we would disappoint the client by showing our humanness. A colleague reports:

A client I had seen for several months asked me to have lunch with her, and we began to socialize. Prior to that, she had been an enthusiastic client—she saw massage as part of a new, healthier way of life, and she saw me as part of this new and exciting direction. Unfortunately, as she got to know me, she found out that I wasn't as perfect in my lifestyle as she had imagined—for instance, occasionally I smoke cigarettes or eat junk food. She became disillusioned and discouraged and stopped making massage appointments.

Befriending some of our clients can also interfere with our relationships with other clients. They may hear about these friendships and become jealous or uncomfortable about the limits of our boundaries.

Here are some guidelines for dealing with the temptation of becoming friends with clients:

ASK YOURSELF IF THE CHANGE IN ROLES WOULD BENEFIT THE CLIENT

Be sure you're not using the client. When you're tempted to become friends with a client, ask yourself if changing the boundaries of the therapeutic relationship truly helps the client or primarily fulfills your own needs.

Here is a colleague's experience:

I never socialize with my clients or even ex-clients, so I was surprised to find myself thinking about asking my ex-client Mary to attend a concert with me. I realized that I was drawn to this unusual boundary bending because I was lonely. A good friend had recently moved away, and I had a gap in my social life. I felt tempted to fill it with an ex-client I really liked. Once I realized what the problem was, I began thinking of other ways to find new friends.

EVALUATE WHETHER THIS CLIENT COULD EVER SEE YOU AS AN EQUAL

Honestly ask yourself whether the client could ever be a friend with you or whether that client has you on a pedestal. A colleague reports:

I was thinking of accepting the invitation of a client to attend a movie together. I liked this client and sensed that she wanted to be friends, but I was concerned that if she saw me in my day-to-day life, I might do something that would interfere with the professional relationship, such as saying something that would hurt her feelings. When I expressed my doubts to her, she said, "Oh, I know it'll be okay to be friends. I know you would never do anything that would be harmful to me." Her saying that helped me see how idealized I was in her mind. I knew we could never really be friends. I had to tell her that I thought it would be best to stick with my policy of not socializing with clients.

SOCIALIZE WITH THE CLIENT, BUT KEEP YOUR PROFESSIONAL ROLE

Sometimes it's not a problem to socialize with clients or ex-clients if practitioners remain aware of their roles and responsibilities.

Vivien Schapera, the director of Alexander Technique of Cincinnati, says that although she does not initiate social invitations with clients, she does sometimes accept them. She has wise advice about socializing with clients and former clients:

We can be social, but we can't show what I call our "lower selves." We can't show our pettiness, neediness, jealousies, etc. We tend to work from our higher selves, so clients tend to think we are better than we really are. We may thrive on this adulation. However, once we become

friends with our clients, we may find ourselves resorting to our lower selves in the same way we do in the comfort of our own homes and with our closest friends.

If we get into a difficult situation with a friend who is also a client, if they push our buttons, we have to pull ourselves out of being 3 years old, regardless of how justified we might feel. We must remember that we are the practitioners, always. It never goes away. No matter how hard it is, we have to be “big,” we have to be the role model, we have to be generous, we have to give the benefit of the doubt, etc.

It’s a delicate and fragile thing to have multiple roles. So if we take someone on as both a client and a friend, we are never justified in letting them down.

LEARN HOW TO TURN DOWN INVITATIONS

Practitioners can feel awkward or unkind when they have to refuse a client’s invitation. It’s a good idea to assure them that it’s part of your professional policy, not a personal rejection. You can say, “Thank you so much for thinking of me; however, I have a policy of never socializing with clients. The relationship we have is special and important for the work that we do together. It would change if we tried to take it outside these walls. I hope that you understand.”

Working with Friends and Relatives

There are several reasons why it’s not a good idea to work with friends and relatives. Professionals need to work with an objective, nonjudgmental attitude and not have their own agendas for a client. Clients need to be able to focus on themselves and not be aware of our needs. These goals are impossible when we work with people who are involved in our lives in other ways.

Here’s an example of having a personal agenda:

Your friend Bill is very uptight about his job these days. Aside from being concerned about him, you want him to lighten up because he’s not fun to be around. When he comes in for a massage, you are highly motivated to help him to relax. Rather than gently coaxing him to let go at his own pace, as you would any other client, you try to force his muscles to soften. Your haste says, “Hurry up and relax, Bill!” However, it’s hard for him to let go because he senses your impatience. It’s a frustrating experience for both of you.

We can also take friends for granted and not give them the same courtesies we give other clients:

Your friend Heather comes to you as a paying client because she's stressed out. You've got some errands to do before the session, and since it's *just* Heather, you know you can start late. Also, you haven't seen her for a while, so you use the session time to catch her up on your news. Is that fair to Heather?

Working with people we know can be hard on practitioners, too. Friends and family don't always appreciate the amount of time, energy, and money we've put into learning a skill that's now intended to support us. They may think that what they're receiving is just a friendly back rub. Also, friends often don't give us the respect we deserve or take the work as seriously as they would with someone they don't know. They may show up late, not call to cancel, or, especially if we work at home, want to hang around after their sessions.

Occasionally, we can make exceptions, but not often. We can sometimes see a friend or family member on a one-time or occasional basis and not have problems, but we have to give serious consideration to whether we want to work with a friend regularly.

Mixing Social Occasions with Work

Just as we don't want sessions to be about socializing, social gatherings aren't an appropriate place to display our professional talents. Even students who don't charge for their work shouldn't comply with requests to rub a sore shoulder outside of an office or a workspace. (An exception can be made for students who get together after school to socialize. The social occasions discussed here are those with prospective clients.) It sets a bad precedent to work during our off-hours.

It can be difficult to turn down friends who want free samples like a little back rub, but we can just smile and say, "I'm off duty." Friends and family need to know that it's unfair to ask us to be available during our off-hours for even a shoulder rub. Also, we can tell them that we don't usually take family or close friends as clients, and if they want a professional massage, we can refer them to someone else. The same applies for consulting at a party about someone's bad back. It's tempting to want to show off or sell our work in a social gathering, but it's not an appropriate place for a professional consultation. We can simply give out our business card and ask the person to call during business hours. We can say, "I'd really like to discuss it with you, but I can't really do you justice in an atmosphere like this. How about calling me on Monday, and I'll be glad to talk with you more."



It can be difficult to say no to friends who want “free samples.”

The Complications of Trades and Bartering

Trades and bartering used to be seen as a charming hippie sort of thing, a way to bypass the supposed crassness of money, a way to live more simply. Some people still feel that way about bartering and trading services and goods. However, trading and bartering have the potential for being real pains in the neck and sources of misunderstanding, especially if they are ongoing rather than one-time practices. Many of the practitioners I interviewed have discontinued doing trades or barter. This is an issue primarily for those in private practice, who have the freedom to make their own financial arrangements.

Trading and bartering are problematic because, along with having the potential confusion of changing roles, they lack the clarity and simplicity of a money exchange. We have to work harder to be sure that each side is happy with what is received and each feels the exchange to be balanced. Here's an example:

Mary agrees to an ongoing trade of massage with her colleague Donna, but as the exchange progresses, Mary feels less and less satisfied. Although Mary treats Donna as she would a regular client, Donna doesn't do the same. She's never on time, she interrupts the massage to take phone calls, and she seems halfhearted in her efforts.

In general, trading for bodywork or massage is more likely to be a problem than bartering, when we exchange our work for a tangible object or a service other than bodywork. The intimacy of our work and the possibilities of transference and countertransference can make trading sessions more difficult. When we trade bodywork, each person finds out about the other's physical and sometimes personal problems. That can interfere with how the person who is the client experiences the massage. For instance, if you know that your practitioner has a persistent wrist problem, would you ask her to go deeper? If you know that she's upset over her divorce, would you complain if she were late for your massage?

Here are some ways to minimize the confusion when doing trades and bartering:

DO ONLY ONE-TIME TRADES

Trades have a better chance of working if they are one-time-only practices and not ongoing. For instance, many practitioners who are new in a community trade as a way to introduce their work to other practitioners.

BE CLEAR ABOUT THE DETAILS OF THE TRADE FROM THE BEGINNING

The challenge with trades is to be very clear what the exchange is. It is best to write it down for both parties to see. Some practitioners say they don't like doing trades because they often end up trading one of their \$70 sessions for someone else's \$50 session. You can trade two sessions for one or one and a half sessions for one, but the point is to enter into the exchange knowing exactly what the trade is and that both parties are satisfied with it.

BE CAREFUL IF YOU BARTER FOR A SERVICE RATHER THAN FOR SOMETHING TANGIBLE

Some forms of barter are unprofessional. For example, bartering for psychotherapy isn't generally considered legitimate in the professional psychotherapy community. But what about bartering for other services? One of the difficulties is in being precise. Suppose you're bartering a session for 2 hours of house cleaning. The client's idea of how a house should look after 2 hours of cleaning can be different from yours. If it's not as tidy as you want, then it's awkward to switch from the nonjudgmental practitioner's role to that of the complaining customer. It's also less than desirable for a client to have such an intimate glimpse of your private life and personal habits. A colleague says, "I don't want clients to see what's inside my car—all the clutter and mess—much less what's inside my house."

However, it can work to barter for other services that have a set fee and are not highly personal, such as bartering for yoga classes.

BE CLEAR ABOUT VALUE WHEN BARTERING FOR GOODS

The happiest exchanges can be for various goods, particularly artwork. It's important that the value of the item be clear and agreed on by both parties beforehand. Also, if you're bartering for something you haven't seen, you may want to decide what will happen if you don't like the finished product.

SPELL OUT HOW TO TERMINATE THE AGREEMENT

Be clear ahead of time about what will happen if one of the parties decides to quit before the exchange is even. Suppose a practitioner is bartering Healing Touch for tap dance lessons. She's given \$200 worth of Healing Touch sessions and has received only \$100 worth of dance lessons. At that point, she decides she doesn't want to be the next Bojangles and doesn't want any more lessons.

Because they hadn't already resolved how to handle this possibility, they now have some potentially sticky questions to resolve. Since she is the one who changed her mind, does the dance teacher owe her anything? And if he does owe her the \$100 balance, does he have to pay it all immediately? The details can vary, but it's best to work them out ahead of time. Putting them in writing makes clear that you both understand the terms.

IF POSSIBLE, TRADE OR BARTER WITH PROFESSIONALS

It's easiest to trade with someone who is a professional at whatever the service or work is. Professionals usually have a clear idea of their prices and know how to work with clients.

BE WILLING TO SAY NO

Don't agree to a trade or barter just to please the other person, and don't barter for something you don't want or need.

Don't agree to a trade or barter just to please the other person, and don't barter for something you don't want or need.

These situations are unbalanced from the start and can breed resentment. You should also be careful about how many such exchanges you take on at once so that you are not working all week and ending up with no cash. Remember that trades and barterers can take more energy than regular clients because of the time spent negotiating terms as well as the likelihood of misunderstandings.

Despite all the possible problems, trades sometimes work out well. Some practitioners have established workable trades with colleagues, often those who were fellow students, in which the trade feels mutually beneficial and the two give each other valuable feedback.

Business Relationships

The ethics of selling products to clients or involving them in business deals is covered in more detail in Chapter 5, Ethical Boundaries. To review, there are two main problems:

1. Because of transference, the client may not be as free as a nonclient to refuse to buy whatever the practitioner is selling. Even just a suggestion from a respected or beloved practitioner can feel like an offer the client can't refuse.
2. If something goes wrong—the lotion is messy, the stocks drop, the pillow doesn't seem to help the neck pain—the client may not feel as free as a nonclient to complain or ask for a refund. And you could lose a client if a business deal or product doesn't pan out.

Some spas strongly urge or require their massage therapists to push clients to buy products from the spa. As discussed in Chapter 5, you want to check out a spa's policy on selling to clients and decide whether you are comfortable with it before you commit to the job.

Involving clients in other business transactions can cause resentment, lower the client's respect for the practitioner, and interfere with the therapeutic relationship.

Just as we don't want to engage clients in business, we want to be careful about taking on business associates as clients. Here's the kind of confusion that can happen:

A massage therapist who is a part-time operating room nurse gave a massage to one of her nursing colleagues. During the massage, when the colleague talked about problems she was having at home and cried, the therapist was appropriately sympathetic and understanding. After that, the colleague started slacking off at work. She excused herself for not doing her part by saying to the nurse/massage therapist, "I know you understand what a hard time I'm having these days."

Practitioners also report having problems when they work with someone who is their boss or has authority over them in another setting. For instance, sometimes bosses want to continue acting as if they are in charge when they become clients. They can be demanding clients, expecting to be given extra time or special concessions. Setting limits with the boss or even contemplating having to set limits can be uncomfortable.

Also, sometimes practitioners rightfully do not wish to know the people for whom they work that intimately or are afraid the boss might make an inappropriate comment or sexualize the situation.

Minimizing Problems

It's often hard to avoid dual relationships. Sometimes we have good reason to take on a friend as a client, do a trade, barter, or even socialize with an ex-client. For example, we may be the only one in town who practices a particular

kind of bodywork, and we think a friend would greatly benefit from that method. We may be the only massage therapist that a shy friend would be comfortable seeing. We may be part of a small community in which it's hard to avoid social contact with our clients.

When are dual relationships likely to lead to trouble, and when might they work? How can we manage dual relationships with the least stress to clients and to ourselves?

Dual Relationships to Avoid

There are a number of circumstances in which a dual relationship would be likely to lead to problems or be harmful to the client.

WORKING WITH FRIENDS OR RELATIVES WHO ARE IN PHYSICAL OR EMOTIONAL CRISIS OR ACTIVELY DEALING WITH ABUSE ISSUES

The likelihood of intense transference or dependency when a friend or relative is dealing with deep emotional issues makes it difficult to work well with that person. Also, we generally have too much investment in such people to have the objectivity to be helpful. A colleague reports:

My friend had a chronic back problem that flared up right before a vacation. I really wanted to help her. In spite of my best efforts, after an hour she was still in a good deal of pain. Had she been a regular client, I would have been concerned, but I probably would have been able to be more objective. I would have stopped at the end of an hour, knowing that I had done my best and that there may be other factors involved, such as emotional issues. But since it was my friend, I kept trying, which only seemed to make things worse. The fact that I couldn't help her was hard on our friendship, and it took a while for us to be able to talk honestly about what happened.

DOING EMOTIONALLY ORIENTED OR PSYCHOLOGICALLY ORIENTED BODYWORK

Practitioners of emotionally or psychologically oriented bodywork should avoid dual relationships. These practitioners are always working with deep transference issues and cannot risk the complications that would arise from dual relationships. As with other dual relationships, people who do emotionally oriented work cannot become friends with clients and can rarely become friends with ex-clients.

HAVING SEXUAL RELATIONSHIPS WITH CLIENTS

As discussed in Chapter 7, maintaining ethical boundaries means that sexual relationships with clients are forbidden and those with ex-clients are entered into with caution and care.

BRINGING CLIENTS INTO OUTSIDE BUSINESS DEALS

As discussed in Chapter 5, involving clients or ex-clients in another business relationship verges on being unethical.

Tips for Working with Dual Relationships

If you decide to have a dual relationship with a client, here are suggestions for making it less of a problem:

DISCUSS YOUR MISGIVINGS WITH THE PROSPECTIVE CLIENT

If friends or family members want to work with you, talk with them about the problems with changing roles. Let them know they would probably benefit more from going to a practitioner they don't know. If you both still want to proceed, check in with them regularly to make sure no problems are arising.

KEEP YOUR USUAL BOUNDARIES AND FRAMEWORK STANDARDS

Because you're already bending boundaries by working with someone you know in another way, you need to be more aware of all other boundaries



Keep your usual professional and framework standards when you're working with a friend.

and framework, not less. You may be tempted to think, “Oh, it’s just old Bob. I can still be eating my sandwich when he arrives.” That would give Bob a message that the setting is not quite professional or safe for him. Aside from interfering with his ability to relax, it’s bad advertising for you. Every client is a potential source of referrals; if someone asks Bob how he liked his massage, you want him to endorse you with enthusiasm rather than think, “I hope she acts more like a professional when she’s with other clients.”

KEEP CONFIDENTIALITY AND SESSION BOUNDARIES

Assure clients with whom you have another relationship that what they say and do inside a session will be held in confidence. Let them know that it’s best for the two of you to keep work-related questions and comments inside the office space.

SEPARATE SOCIAL TIME AND PROFESSIONAL TIME

Advise clients that they will get more out of their sessions if you don’t mix session time with either social or business time—if you don’t chitchat during sessions, talk about business, or go to lunch together right before or after sessions. You might want to stop seeing a friend socially while he or she is a client or, at the very least, not take the friendship to another level. If someone is, for instance, a friend that you see socially every few months, you don’t want to start having lunch once a week during your work together.

Special Considerations for Students

It’s particularly common for students to work with friends and relatives while they are learning their trade. Although this is not usually a good idea for a professional practice, this can be a useful way for students to acquire experience, become accustomed to doing a certain number of sessions a week, and practice their “bedside manner.”

Even in a practice situation, the problems of dual relationships arise. Dianne Polseno, former ethics columnist for the *Massage Therapy Journal*, quotes a massage student: “No one’s talking about the real issues. I certainly know not to date or sleep with a client. What I don’t know is how to handle the ‘little things’ that crop up when I massage relatives and friends. For me, this is one of the most stressful aspects of my work.” (Polseno D. Ethically speaking: multidimensional relationships. *Massage Ther J.* 1999;Winter:113.)

The same “little things” that come up for students also come up for more experienced professionals when they have dual relationships—keeping a friend’s massage from becoming a social occasion, dealing with friends who expect a free foot massage, and so forth. However, these situations are more common and troublesome for students who are starting their practices and

may feel insecure about claiming a professional role and setting appropriate boundaries.

Here are some suggestions to help students start out on the right foot:

SET BOUNDARIES FROM THE BEGINNING

When you begin to do practice sessions with friends and family, let them know what to expect from the beginning. You can say, for instance, “I appreciate your being a guinea pig now as I’m learning my trade, and the session will be free. When I’ve graduated, I’ll charge all my clients \$60” (or whatever amount you plan to charge).

It’s easier to set limits at the time the initial appointment is arranged, not after resentment has built because a friend has stayed for 2 hours after her massage. “I’ll have an hour available from 2 to 3 o’clock, and then I’ll have to take care of some other business.” It’s up to you to let friends and family know the boundaries. They may not realize that they’re taking advantage of you.

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TREAT FREE SESSIONS AS IF THEY WERE “REAL” SESSIONS: PRACTICE BOUNDARIES

A good way to develop professionalism and help the boundaries stay clear is to treat each session as if the client were paying. Let friends and family members know that they will be treated as regular clients and explain what that means: you want to start and end on time, you’ll use appropriate draping, and they may talk if they want, but you won’t respond by chatting in the way that you would in a social situation. You can explain that this framework is helpful to you as a student and will also help them get the most out of their sessions. An added bonus is that friends and family members will have the experience of seeing how professional you’ve become and will be more inspired to recommend you to someone else.

Be Wary of Dual Relationships

Sometimes we’re lucky and squeak by without problems with a dual relationship. Usually, though, these relationships lead to anything from minor annoyances (putting extra energy into sorting out misunderstandings) to major problems (being in hot water for unethical behavior). Clients who are entangled in dual relationships with us often don’t benefit from our work as much as other clients do. There just isn’t the same amount of attention and therapeutic focus.

Decisions about whether to take on a person as a client need to be based on solid professional judgment, not ease and convenience. However despite the drawbacks, dual relationships will probably always be with us. It helps if

we realize the problems intrinsic to their nature and take extra precautions to make the professional relationship safe for both parties.



QUESTIONS FOR REFLECTION

- 1 Outside of massage or bodywork, have you ever been part of a dual relationship with a friend or family member? How did it work out? If it worked out well, what do you think made it successful? If not, what got in the way?
- 2 Have you ever been part of a trade? Were you satisfied with what you received from it? If not, what would have made it better?
- 3 Have you ever been in a situation with a professional or a businessperson in which there was a dual relationship? Were there any problems related to the dual relationship? If not, what do you think helped? If there were problems, what would have helped lessen or eliminate them?
- 4 At a social occasion, have you ever gotten involved in essentially giving a free consultation or sample of your work to a potential client? How did that work out? If it worked out well, what made the difference? If not, what would you do differently to avoid problems next time?
- 5 Have you ever gone from being a client to being a friend of a professional of any kind? Were there any issues to work out—for instance, were you disappointed when you found out more about the professional? If it has worked out well to be a friend, do you think that it would always work out well to become a friend of the professionals in your life? Why or why not? If it didn't work out well, what made the difference?