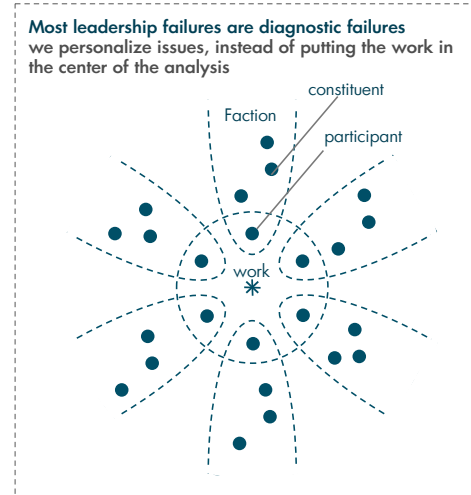


Peer Consultation Protocol

The purpose of the peer consultation is to help people with complex adaptive challenges and leadership work. It is designed to gain new diagnostic insights and action options beyond more traditional inquiries.

The value often lies in helping the case presenter see a situation in a very different light. It is an exploration where there are no bad or wrong ideas. Sometimes the interpretations of the consultation group might be a little uncomfortable to the case presenter.

Each case is unique. The questions below will serve as guiding questions. You may not answer all of them in each case, but they may help you think about different directions in your analysis.



1. Case presentation (5 min)

Case Presenter presents facts.

Goal for case presenter: To present to your consultation group a leadership challenge you have confronted or are confronting:

- What is the mission (or purpose) of your organization or your sub-group?
- What is the Adaptive Challenge the group needs to face?
- Who are the relevant stakeholders to the challenge, and what are their points of view on the challenge? What would success look like for them?
- What kind of authority (formal/informal/both) and resources do you have to manage the organization and its environment?
- What options do you see, and what might you do?

2. Q & A with the case presenter to gather data (8 min)

Goal for the group: To understand the adaptive challenge and the complexities surrounding it and to gather information to help you conduct a diagnostic brainstorming in the next phase.

- Focus particularly on the questions from section 1 that remain open.

3. Group's diagnostic discussion (8 min)

Goal for the group: To interpret what is happening, offer alternative interpretations (not solutions), and illuminate new ways to understand the case.

Case Presenter goes to the balcony and listens to the group's diagnostic brainstorming. Case Presenter does not talk at all!

- Generate multiple hypotheses: What do you think was the adaptive challenge?
- Pick or frame one adaptive challenge to deepen your analysis. Then, draw a faction map.

- To which faction does the presenter belong? What issues or values does the presenter represent in the case? What losses does this faction fear?
- How does the situation look to the other factions? What is the story they are telling themselves? And why does it make sense from their perspective? What issues or values do they represent? What losses do they fear?
- What options are off the table for the presenter and why? How has the presenter contributed to the problem?

4. Group brainstorms action ideas (3 min)

Case Presenter listens while the group brainstorms action options.

Goal for the group: To offer possible new initiatives, smart risks, and experiments for the case presenter to try to move the challenge forward.

- Which additional data should be gathered?
- What possible interventions can the presenter make? What safe experiments can the presenter run?
- What tough conversations need to happen?
- What partnerships, alliances, or relationships need to be built?
- What might progress look like and what milestones can the case presenter set?

5. Case presenter reflections (4 min)

Case Presenter reflects on what s/he heard.

The goal for this section is for the presenter to share their reactions to the consultation process. The presenter can also ask questions that have come to them during the consultation.

- Do not “solve” the case – Do not defend yourself – Think out loud about what was interesting, difficult, and surprising about the process.
- Think about experiments you can run over the next three months to learn more about your challenge and make progress on “the work”!

6. Group debriefs their experience (2 min)

The goal for this section is for the group to share their reaction to the consultation process. This is a “balcony” opportunity for the whole group to think about their productivity.

- How productive was the group? What work did it do? What work did it avoid?
- How did the group follow through with ideas for improvement from the last session?
- How are people trying new ideas and experimenting with new language beyond their previous expertise?