

Collaboration Consultations – How to Make Progress

Purpose

The purpose of the consultation process is to use your own experiences to better understand your adaptive leadership challenge and provide you with some real data on your strengths, weaknesses, blind spots and hidden potential. You will hopefully learn from the interaction on the content (your case) as well as the process (what happens in the group) by watching the group dynamic and trying out different roles within the group.

Process

This is a structured process, with clear time boundaries and roles. You will be formed into a small group and will spend 45 minutes to focus on your person's case. Every participant is required to participate in this group in different ways:

- You: The Case Presenter (CP) will prepare a brief description of the case focussing on the core of the case.
- The Facilitator: The Designated Authority (DA) will perform the typical role of a group's leader.
- Your consultants: The group (including the DA) are Consultants charged with giving good consultation to the CP.

The usual rules apply about listening to others, respect, etc. During the sessions you may be privy to confidential material from other participants. The conventions of the Chatham House rule apply.

Roles

1. Case Presenter (CP)

- Your overall purpose is to learn to take corrective action by using the group to learn more about the case. The case is not for the group to learn – it is for you to learn.
- A successful change agent needs to know what is essential and how to ask for help. So:
 - You need to present your case verbally in an engaging story.
 - Avoid jargon
 - You may also want to develop one or two questions to draw the consultation you require – although they may be ignored.
- Stay with your audience. There is no point talking if no one is listening. Keep your story short – 5 minutes – so that there is adequate time for consultation.
- Do not feel that you need to do an analysis or present solutions. That is the role of the group. Just tell the story.

2. Designated Authority

- Your purpose is to guide the group in helping the CP to learn from their case.
- In session, you are responsible for the effective running of the session including:
 - Sticking to the time limit, particularly making sure the CP doesn't take more than 5 minutes to tell their story.
 - Ensuring the Consultants stay on track.
 - Making sure that the overall purpose of helping the CP is being achieved.
- You perform the traditional social functions of an authority role: responsible for the functioning of the group.

3. Consultants

- Your purpose is to help the CP understand their situation better, their role in it and what options would allow better outcomes. It may look as if the CP is doing all the work but your challenge is to listen – really listen. Listen to what is said and not said. What is not said is not only the non verbal (ie. Body language) but also what is unsaid. That is, the words that are missing.
- In consultation you will need to increase understanding and promote learning. So the usual techniques are important:
 - Listening – actively.
 - Reflecting back.
 - Questioning effectively – open questions which promote insight.
 - Challenge the CP if it is useful.
- Above all be present – mentally and physically!

Session Guide - Process

1. Case presenter presents facts	5 mins
2. DA feeds fact questions from the group to case presenter	10 mins
3. Case presenter watches and listens while group diagnoses the dynamics of the case presentation.	15 mins
4. Case presenter watches and listens while group provides action steps and reflection questions	10 mins
5. Presenter reflects on what she/he heard	5 mins

Following are some possible questions (this is a guide only!)

Step 2 - Fact questions asked directly to the CP (the purpose is to get more data and information from the CP. You are not giving advice or interpreting what is going on)

1. Who are the major players?
2. What is your role?
3. What are their formal relationships? Informal alliances?
4. Where is the senior authority on the issue?
5. What has the presenter done so far to work the problem?
6. What has the presenter decided not to do?
7. What would success look like to the presenter?
8. Who is responsible for....?
9. Where does your role sit structurally?
10. What is in it for you?

Step 3 - Diagnostic questions which are part of the consultation process (purpose to support interpretation and make sense of the adaptive challenge facing the CP)

1. What are the case presenter's stakes?
2. What issues or values does the presenter represent to the group?
3. What are the underlying or hidden issues?
4. What are the value choices each has to make?
5. How does the situation look to the other key players?
6. What options are off the table for the presenter and why?
7. What has the presenter contributed to the problem? What is her/his piece of the mess?
8. What possible interpretations has the presenter been unwilling to consider?
9. What would success look like to the players other than the presenter?
10. What adaptive work has been undertaken? A shift in which values and beliefs will allow progress to be made?
11. What are the losses for all factions