Case Clinic 1.0

Overview

Case Clinics guide a team or a group of peers through a process in which a case giver presents a case, and a group of 3-4 peers or team members help as consultants based on the principles of the U-Process and process consultation. Case Clinics allow participants to:

- Generate new ways to look at a challenge or question
- Develop new approaches for responding to the challenge or question

Purpose

To access the wisdom and experience of peers and to help a peer respond to an important and immediate leadership challenge in a better and more innovative way.

Principles

- The case should be a leadership challenge that is current and concrete.
- The case giver needs to be a key player in the case.
- The participants in the case clinics are peers, so there is no hierarchical relationship among them.
- Don't give advice; instead listen deeply.

Uses & Outcomes

- Concrete and innovative ideas for how to respond to a pressing leadership challenge
- High level of trust and positive energy among the peer group
- Use with: Mindfulness and listening practices

An Example

Participants of a master class program form peer learning groups. They do their first case clinic while they are in the program, and then use the process for monthly phone calls that allow each participant to present a case.

Set Up

People & Place

- Groups of 4-5 peers
- Sufficient space so that groups can work without distractions

Time

- A minimum of 70 minutes is required

Materials

- Chairs for each group to sit in a circle or around a table
- The handout of the process

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Process

Roles & Sequence

Case giver: Share your personal aspiration and leadership challenge that is current, concrete, and important, and that you happen to be a key player in. You should be able to present the case in 15 min and the case should stand to benefit from the feedback of your peers. Include your personal learning threshold (what you need to let-go of and learn).

Coaches: Listen deeply—do not try to "fix" the problem, but listen deeply to the case giver while also attending to the images, metaphors, feelings and gestures that the story evokes in you.

Timekeeper: One of the coaches manages the time.

Step	*Time*	Process
1	*2 min*	Select case giver and time keeper
2	*15 min*	Intention statement by case giver Take a moment to reflect on your sense of calling. Then clarify these questions: 1. Current situation: What key challenge or question are you up against? 2. Stakeholders: How might others view this situation? 3. Intention: What future are you trying to create? 4. Learning threshold: What do you need to let-go of – and what do you need to learn? 5. Help: Where do you need input or help? Coaches listen deeply and may ask clarifying questions (don't give advice!)
3	*3 min*	Stillness 1. Listen to your heart: Connect with your heart to what you're hearing. 2. Listen to what resonates: What images, metaphors, feelings and gestures come up for you that capture the essence of what you heard?
4	*10 min*	Mirroring: Images (Open Mind), Feelings (Open Heart), Gestures (Open Will) ● Each coach shares the images/metaphors, feelings and gestures that came up in the silence or while listening to the case story. ● Having listened to all coaches, the case giver reflects back on what s/he heard.
5	*20 min*	Generative dialogue ● All reflect on remarks by the case giver and move into a generative dialogue on how these observations can offer new perspectives on the case giver's situation and journey. ● Go with the flow of the dialogue. Build on each other's ideas. Stay in service of the case giver without pressure to fix or resolve his/her challenge.
6	*8 min*	Closing remarks ● By coaches ● By case giver: How do I now see my situation and way forward? ● Thanks & acknowledgment: An expression of genuine appreciation to each other.
7	*2 min*	Individual journaling to capture the learning points

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