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CLA Peer  
Consulting  
Methodology



The following pages describe the Cambridge Leadership Associates Adaptive Leadership™ Case Consultation methodology that has been used by thousands of people across private, public and non-profit sectors.

The structure of this process can feel awkward at first, but is designed to surface new interpretations and areas of activity that would not be realized in traditional dialogue.



The value of the consultation often comes from the diagnostic breakthroughs, helping the Case Presenter see the situation in a fundamentally different way than he or she presented it to the group.

This diagnostic process requires the group to be free to brainstorm without constraint: there are no bad ideas, nor are there avenues closed to exploration. What often happens is that as themes develop, the group will gravitate toward one or two ideas about how to look at the case that are new and perhaps even uncomfortable for the Case Presenter.



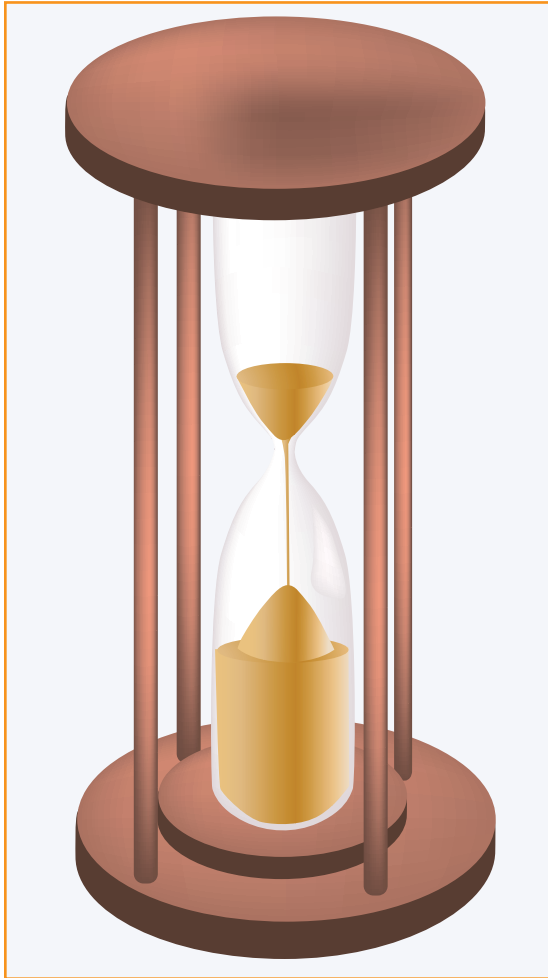
With a small group, identify a Case Presenter, facilitator, and note taker. The facilitator will help manage the time boundaries, keeping the Case Presenter from controlling the conversation and the note taker will help the Case Presenter debrief afterwards.

Often, Case Presenters find themselves spinning a bit from the experience. It is a good practice to both take a break shortly after the consultation and to have one person check in with the Case Presenter afterwards.

Suggested time allocation for this process is a 45 minute consultation.

- Case Presenter presents facts:  
*5 minutes*
- Group feeds Data Gathering questions to Case Presenter:  
*10 minutes*
- Case Presenter “goes to the balcony”, and watches and listens while group does diagnostic brainstorming (Case Presenter does not speak at all!):  
*15 minutes*
- Case Presenter watches and listens while group does action steps brainstorming:  
*5 minutes*
- Case Presenter reflects on what she/he heard:  
*5 minutes*
- Group debriefs on the consultation:  
*5 minutes*

The proportions are important, especially allocating at least twice as much time to diagnosis as to any of the other pieces. We get comfortable and attached to our stories and we need other people to open up and interpret other versions of reality and possibility.



## Traps for the group to watch out for:

- Lack of clarity on what the Adaptive Challenge is. Make sure you establish this before moving ahead.
- Case Presenter will not be able to remain silent and will dominate the conversation, defending and explaining.
- Consultants will jump too quickly to solutions, especially technical solutions.
- Consultants will be afraid to tell the Case Presenter difficult news or information that would be helpful to them.
- Case Presenter will hide real stakes and anxieties.
- Consultants will offer insight from their own experience or expertise, rather than see the problem through the eyes of the Case Presenter and other people in the case.



SECTION	FRAMING QUESTIONS
<b>Case Presentation</b> (5 minutes)	<p><b>Goal for Case Presenter</b> – To present a Leadership Challenge that you face:</p> <ul style="list-style-type: none"> <li>• What is the Adaptive Challenge?</li> <li>• Who are the major players? What are their conflicting perspectives and interests?</li> <li>• What action have you taken or are thinking about taking in reference to the challenge?</li> <li>• What are your real stakes and interests?</li> <li>• Are there any hidden issues?</li> </ul>
<b>Data Gathering Questions</b> (10 minutes)	<p><b>Goal for Group</b> – To understand the Adaptive Challenge and the complexities surrounding it and to gather information to help you conduct Diagnostic Brainstorming in the next phase.</p> <ul style="list-style-type: none"> <li>• Who are the major players? What are their formal relationships? Informal alliances?</li> <li>• Where is the senior authority on the issue?</li> <li>• What has the Presenter done so far to work the problem? What has the Presenter decided not to do?</li> <li>• What would success look like to the Presenter?</li> </ul>
<b>Diagnostic Brainstorming</b> (15 minutes)	<p><b>Goal for Group</b> – To interpret what is happening, offer alternative interpretations, and illuminate new ways to understand the case.</p> <ul style="list-style-type: none"> <li>• What are the Case Presenter’s stakes? What challenges face the Presenter related to loss, competence, and loyalty?</li> <li>• What issues or values does the Presenter represent to in the case?</li> <li>• What are the underlying or hidden issues? What are the value choices each has to make?</li> <li>• How does the situation look to the other players? What is the story they are telling themselves?</li> <li>• What options are off the table for the Presenter and why?</li> <li>• What has the Presenter contributed to the problem? What is her/his piece of the mess?</li> <li>• What possible interpretations has the Presenter been understandably unwilling to consider?</li> <li>• What would success look like to the players other than the Presenter?</li> </ul>
<b>Action Step Brainstorming</b> (5 minutes)	<p><b>Goal for Group</b> – To offer possible new initiatives, smart risks, and experiments for the Case Presenter to try to move the challenge forward.</p> <ul style="list-style-type: none"> <li>• What possible initiatives should be undertaken?</li> <li>• What are low risk tests of some of the ideas discussed?</li> <li>• What courageous conversations need to take place?</li> <li>• What new partnerships or relationship shifts need to happen?</li> <li>• What are specific and possible goals over the next month to achieve?</li> </ul>
<b>Case Presenter Reflections</b> (5 minutes)	<p><b>Goal for Case Presenter</b> – Not to resolve the case! This time is intended for the Presenter to share initial reactions to the process and ask specific questions that he/she is now pondering.</p> <ul style="list-style-type: none"> <li>• Comment on what has been heard. The idea is that the Presenter will “rent” the ideas, trying them out, rather than “buying” them or defending against them.</li> <li>• Identify any action step(s) you may undertake in the next six weeks.</li> </ul>
<b>Group Debrief</b> (5 minutes)	<p><b>Goal for Group</b> – To “get on the balcony” and reflect on how well they did the consultation and how to improve in the future.</p> <ul style="list-style-type: none"> <li>• What did the group accomplish and what did it avoid?</li> <li>• What default behaviors did participants observe?</li> <li>• What could be done to improve consultations in the future?</li> </ul>



The first skill to develop is the ability to observe and take in more key information than you are now. This is a critical skill to the Adaptive Leadership™ Case Consultation. There is an incredible amount of information available to you at any moment. The following is an introductory list of “Flags” that may indicate important information for the case consultation. Here is a beginning list of things to look for during Adaptive Leadership™ Case Consultations.

## Observation Flags

- 1. Language** – Watch for specific key words and track when particular language is used multiple times. This may signal the mental model present for the individual.
- 2. Win-wins** – Look for statements that will “keep everyone happy” – they may indicate the Case Presenter may not understand adaptive elements and consultants might need to identify potential losses to the Case Presenter.
- 3. Above/Below the Neck** – Track where the story is being told from – an intellectual place, emotional, or spiritual. This will give signals to who the Case Presenter is and how he or she is connecting to the issues.
- 4. Adaptive Problem Definition** – Watch what happens, but do not be seduced by it. The first telling of the case will often be how the Case Presenter wants you to perceive it – 70% of the time the first issue presented is not the Adaptive Challenge you are trying to detect.
- 5. Emotion Content** – Where does the Case Presenter get emotional? What triggers the emotion and how does the person calm the emotion? This can indicate the identity issues at stake or more resonant in the case.
- 6. Stakes for Presenter** – Why is the Case Presenter presenting this case to you at this time? Where is he or she really stuck that he or she might need your help? How much is he or she invested in the problem, solution, and continuing the status quo?
- 7. 2D or 3D Opposition** – How are the others stakeholders and the opposition characterized? Are they simplified and portrayed as evil (2-Dimensional) or are they complex and held with empathy (3-Dimensional)? This may indicate to you the sophistication of the stakeholder analyses.
- 8. Hungers** – We all have hungers for power, affirmation and intimacy – how do these come out in the case, if at all? They may indicate where ego needs are coloring the Adaptive Challenge.





Story Paradigm	Points of Inquiry
<p><b>1. Hero</b></p> <p>The Case Presenter tells a wonderful story about how large and difficult a challenge (the dragon) he/she has encountered.</p>	<ul style="list-style-type: none"> <li>● What challenge are you facing now?</li> <li>● What is the gap between current reality and your aspirations?</li> <li>● Was the fix a technical solution to an Adaptive Challenge? If so, what pieces will arise again?</li> <li>● What new challenging partnerships might be needed to sustain the work?</li> </ul>
<p><b>2. Where's Waldo?</b></p> <p>The details of the story are rich and exciting but you can't find the Case Presenter in the story anywhere.</p>	<ul style="list-style-type: none"> <li>● Where are you in the story?</li> <li>● What have you tried that worked?</li> <li>● What have you tried that failed?</li> <li>● How would others tell the story of what you have done in this situation?</li> <li>● How does the story impact you?</li> </ul>
<p><b>3. End World Hunger</b></p> <p>The challenge facing the person is so huge and impossible that failure is ok and without real guilt ("well I tried, right?").</p>	<ul style="list-style-type: none"> <li>● What would success look like for you? ... in the next month? ... six months? ... three years?</li> <li>● What are you accountable to? What are you accountable for?</li> <li>● What are the consequences of continuing as things are now? Are they acceptable to you or not?</li> <li>● What systemic forces make change so difficult?</li> </ul>
<p><b>4. Righteous Prophet</b></p> <p>I hold the truth that everyone else needs to come to.</p>	<ul style="list-style-type: none"> <li>● What are the strengths and weakness of the strategy?</li> <li>● What conflicts lie between what you espouse and what others desire?</li> <li>● Why have others not joined to date?</li> </ul>
<p><b>5. Sharks and Jets</b></p> <p>If the opposition would just get out of the way, life would be fantastic.</p>	<ul style="list-style-type: none"> <li>● What is a noble intention of the other side? What stories might they tell themselves?</li> <li>● Who else is affected other than the opposition?</li> <li>● If the opposition was successful what would happen?</li> </ul>
<p><b>6. Honorable Mediator</b></p> <p>I am just in the middle of a complex situation where I have no personal stakes but to make everyone happy.</p>	<ul style="list-style-type: none"> <li>● What are your stakes in the outcome?</li> <li>● Why did you choose to present this case now?</li> <li>● What are the different potential outcomes and who would have to give up what in each?</li> <li>● How much of your portfolio is key to this issue?</li> </ul>