CONSULTANCY PROTOCOL

This protocol is designed to elicit multiple perspectives to support a coach in thinking through a dilemma while also increasing their capacity to address it by leveraging the insights and perspectives of others.

Participants

Roles: Facilitator, Case Giver, Consultants (all other participants), Timekeeper (optional)

Group Size: 4-7

Time: 30-40 minutes

Materials

In-person and virtual: Notetaking materials, timer

Instructions for Use

Step 1 (2 min.): **Identify Roles:** Identify a Case Giver and Facilitator.

Step 2 (5 min.): **Present a Coaching Dilemma:** Case Giver briefly shares a current coaching dilemma, any relevant dynamics, and previous attempts to address it, if applicable.

Step 3 (3 min.): **Clarifying Questions:** Consultants ask the Case Giver clarifying questions to elicit additional information that will support them to consult more effectively.

Step 4 (6+ min.): **Reflecting Back- Go Rounds:** Case Giver is silent while consultants describe what they heard the Case Giver convey during the presentation ("What did you hear in this presentation?").

Then, additionally, the facilitator utilizes additional prompts to ensure the group has the fullest description of the dilemma and its complexities ("What seems important to the coach?" "What surprised you?" "What does this problem really seem to be about?").

During Go Rounds, consultants should pass if their reflection has already been shared.

Step 5 (2 min.): **Response:** Case Giver briefly responds to consultants' expressed understandings of the problem and provides further clarification as needed.

Step 6 (6 min.): **Brainstorming:** Case Giver is silent while consultants have an open conversation and brainstorm next steps.

Step 7 (3 min.) **Response:** Case Giver responds to acknowledge any new questions, insights, or shifts in perspective gained through listening.

Step 8 (5 min.): **Debrief:** Discuss and/or journal how it felt to be in each role and any takeaways.

SYSTEM IMPROVEMENT LEADS
INSPIRE • CONNECT • INNOVATE