

ADAPTIVE CHANGE ADVISING PROTOCOL

In your peer advisory group, decide on a Case Presenter and a Timekeeper. The times below are important to the protocol. It is the Timekeeper's responsibility to maintain them. Notes should be handwritten; no audio or video recording.

ROLES AND SAMPLE QUESTIONS

Case Presentation (5 minutes)	OBSERVATION	Case Presenter: Describe the leadership challenge you face. • What is the challenge or problem you're facing? Gap you're trying to narrow? • Who are the major players? What are their conflicting perspectives and interests? • What action have you taken or are thinking about taking? • What are your stakes and interests? Any hidden issues? • What do you want to be advised on by your group? Adaptive Change Advisors: Listen and observe carefully. Don't interrupt or ask questions yet.
Diagnostic Questions (10 minutes)	OBSERVATION	Adaptive Change Advisors: Gather data about values, loyalties, losses and pressures; keep questions short. • What is the pressure on the major players to behave as they do? • Where is the senior authority on the issue? • Who has the most to lose? • What has the Case Presenter done to solve the problem? What has the Presenter taken off the table? • What does success look like to the Case Presenter? Case Presenter: Keep your answers on point, but feel free to elaborate if necessary.
Diagnostic Brainstorming (15 minutes)	INTERPRETATION	Adaptive Change Advisors: Generate as many interpretations as possible. Remember it's brainstorming, so no debating. Try raising the heat. Stay at it for the full 15 minutes. • What are the Case Presenter's stakes? Losses at risk? • What role in the system does the Case Presenter represent? • Are there underlying issues hidden beneath the Case Presenter's responses? • How does success look like to the other players? What is the story they are telling themselves? • Why might the Case Presenter have taken options of the table other than for the stated reasons? • How might the Case Presenter be contributing to the problem, i.e. their piece of the mess? • What is an uncomfortable interpretation the Case Presenter been understandably unwilling to consider? Case Presenter: Turn your back and remain silent on the "balcony". Take notes.
Action Step Brainstorming (15 minutes)	INTERVENTION	Adaptive Change Advisors: Try to generate 10-20 actions, ranging from safe to risky. Watch out for group think. • What are low risk tests of some of the interpretations discussed? High risk tests? • What courageous conversations need to take place? • What new partnerships or relationship shifts need to happen? • What are specific and achievable goals over the next month? Case Presenter: Still on the balcony. It's almost your turn. Listen carefully for the nuggets.
Case Presenter Reflections (5 minutes)	O-I-I FREE FOR ALL	Case Presenter: Welcome back from the balcony. It's (only) your turn to talk now. Play with the ideas you heard, resisting the urge to defend or talk "louder". • What did you learn? • What if anything surprised you? Shocked you? Intrigued you? Got you in the heart or gut? • What might you consider doing differently as a result? • Has your understanding of your challenge shifted? How? Adaptive Change Advisors: Just listen. Using yourself as data, notice your reactions to the Case Presenter.
Group Debrief (5 minutes)	O-I-I FREE FOR ALL	Team: The case consultation is finished. Get on the balcony now and just discuss the group's own dynamics and patterns, not the case itself. • What did we accomplish as a group? What did we avoid? • What default behaviors did we observe? Did someone dominate the airtime? Hold back? Was that useful? • What could be done to improve consultations in the future? • Did the Case Presenter's affect impact our ability to dive in? How so?

