

Acting & Leading with Wisdom: Practices to Enhance Collective Reflection

Facilitated by Sherry Immediato – sherry@heaven-and-earth.com – June 20, 2013



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Theory U Toolbook 1.1

Case Clinics

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Two Sources of Learning, Two Learning Cycles

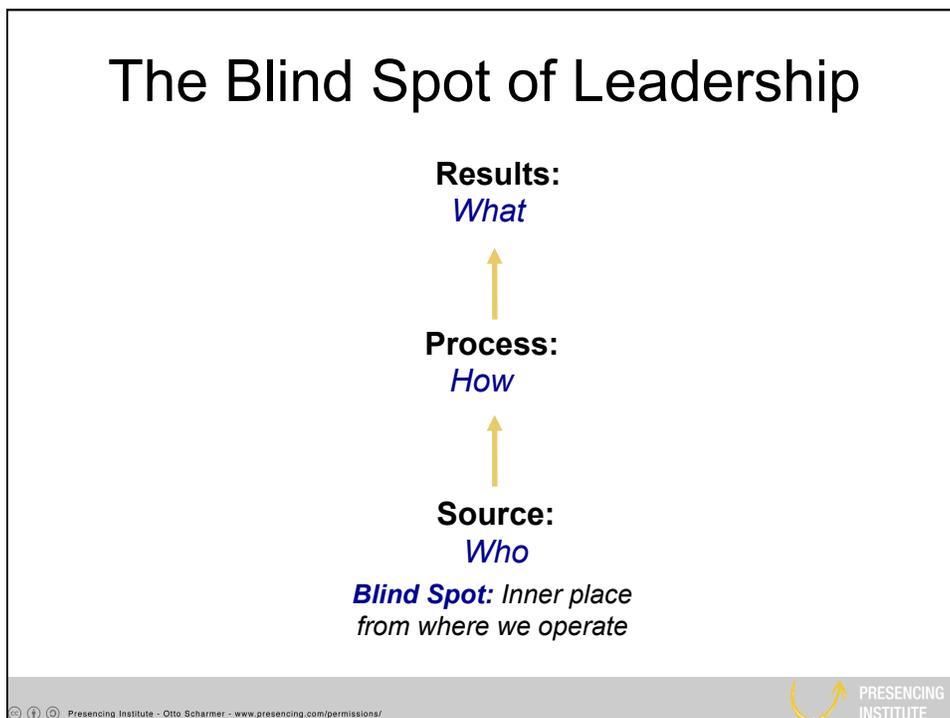
A. Learning by reflecting on the
experiences of the past

act - observe - reflect - plan - act

B. Learning from the future as it emerges
(presencing)

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“The success of an intervention depends on the interior condition of the intervenor.”

William O’ Brien,
former CEO of the Hanover Insurance Company

3 Movements of the U

Downloading

**Observe,
observe,
observe**

**Act in an
instant**

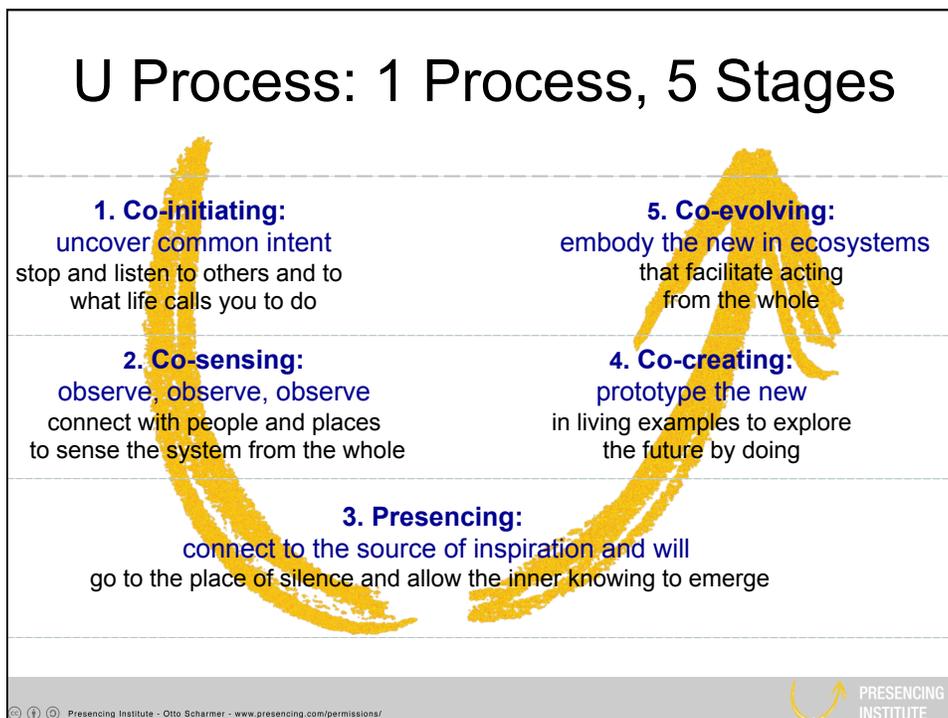
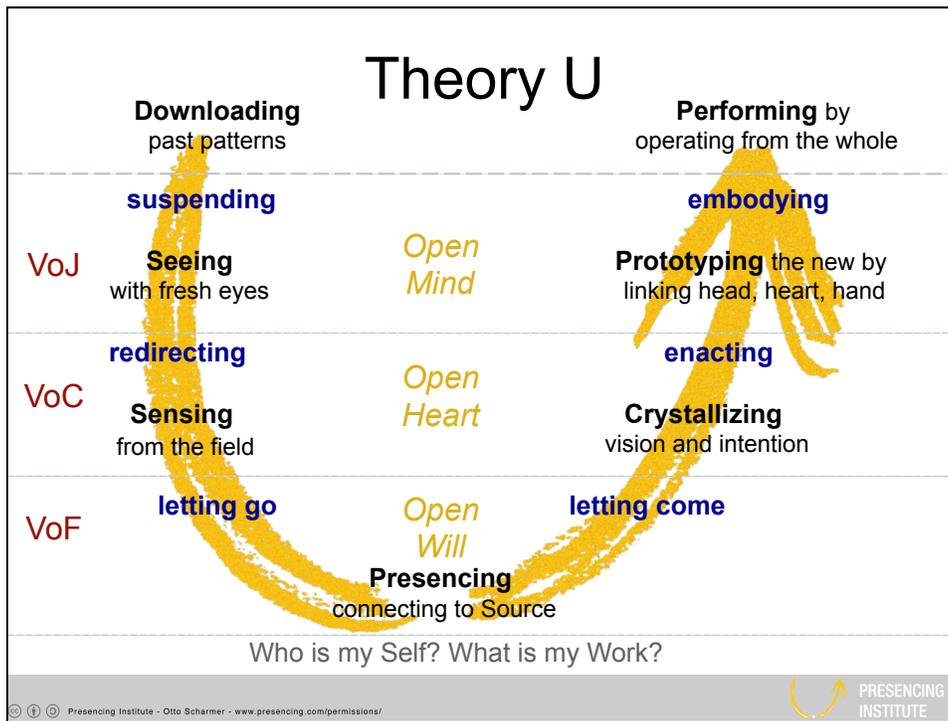
**Retreat and reflect:
Allow the inner knowing to
emerge**

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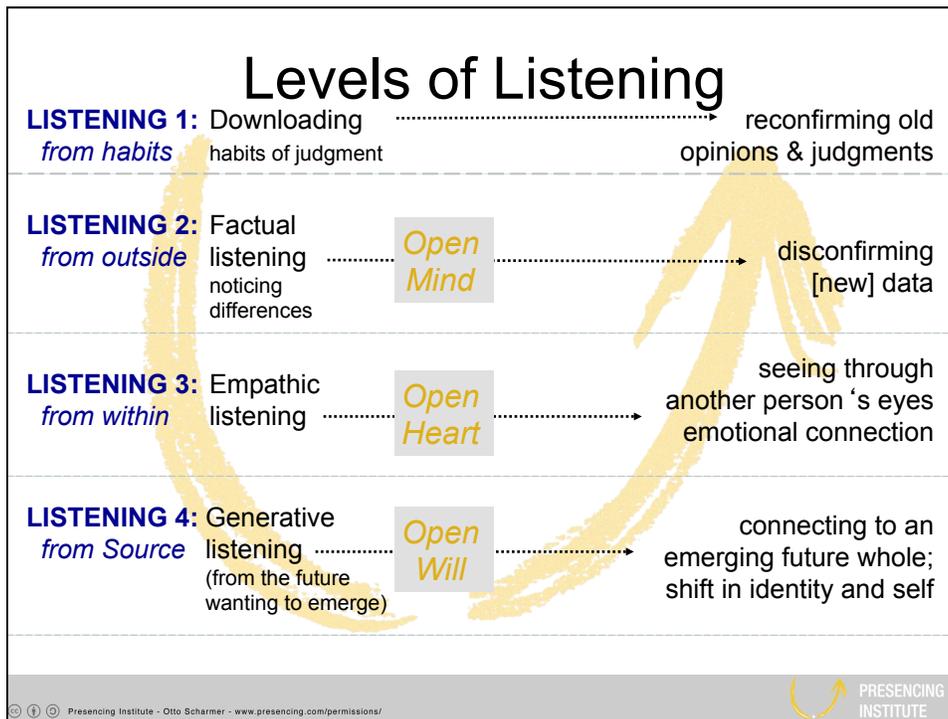
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Case Clinics



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At a Glance

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 move into a helper or consultant role based on the principles of the U-Process and process consultation.

Case Clinics allow participants to:

- generate ways of framing the issue and
- develop new approaches for responding to it.

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Case Clinics: 1. Purpose & Outcomes



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Purpose

To help a colleague responding to an important and immediate leadership challenge better and more effectively.

Outcomes

1. Concrete and innovative ideas for how to respond to the pressing leadership challenge.
2. High level of trust and positive energy among the peer group.
3. A rapid collective U experience in about 70 minutes.

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Case Clinics: 2. Logistics



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People & Place

Groups of 4-5 peers each.
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.
Flipchart and marker.

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Case Clinics:
3. Process



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Step 1

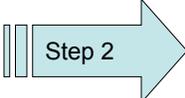


Preparation:

Have people think about a leadership situation:

- That is current, concrete and important;
- The case giver happens to be a key player;
- Can be presented in 10 minutes; and
- Could make a big difference moving forward.

Step 2



- Put group in teams of 4 or 5.
- Give each group a process hand-out with the instructions and introduce the process.
- Send groups off to complete process; reassemble to debrief and share learnings.

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(0)	2 min.	Select case giver and timekeeper
(1)	10-15 min.	<p>Intention Statement by case giver</p> <ul style="list-style-type: none"> ➢ <u>Situation</u>/Problem/Opportunity/Project= What do you want to address? ➢ Your <u>intention</u>: What do you want to create? ➢ Your <u>edge</u>: what do you need to let go of and learn? ➢ <u>Help</u>: Where do you need input and help? <p>Consultants ask clarifying questions if necessary</p>
(2)	5-10 min.	<p>2-3 min Stillness. Then mirroring by each consultant</p> <ul style="list-style-type: none"> ➢ What <u>images</u> and <u>feelings</u> come up for me now? ➢ What <u>questions</u> are evoked in my mind?
(3)	30 min.	<p>Generative Dialogue and solution brainstorming by all</p> <ul style="list-style-type: none"> ➢ Case giver <u>reflects</u> on the images and emotions that the case evoked ➢ Consultants ask <u>questions</u> to deepen understanding ➢ Generative Dialogue: <u>Co-create</u> ideas for solutions.
(4)	10 min.	<p>Concluding Remarks by consultants</p> <ul style="list-style-type: none"> ➢ What is the key issue to be addressed [diagnosis]? ➢ What solution/action do I propose?
(5)	5 min.	<p>Concluding remarks by case giver</p> <ul style="list-style-type: none"> ➢ What new insight do the solutions offer to me? ➢ How could I use/combine these ideas going forward? ➢ Thank you!
(6)	3 min.	Journaling — Capturing the key learnings by all

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Theory U Tool Case Clinic - 7

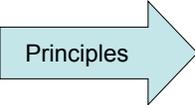
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Case Clinics: 4. Principles



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 Principles

The case giver must own the case, meaning that she or he needs to be a key player in the situation at issue.

The participants in the case clinics are peers, so there is no hierarchical relationship among them.

One participant assumes into the role of the timekeeper and ensures that participants move through the outlined process.

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Case Clinics: 5. Sources



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 Sources

- C. Otto Scharmer, *Theory U*: Chapter 21
- www.theoryu.com, www.presencing.com

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