

Tool: Case Clinic

Overview

Case Clinic is a peer coaching process designed to identify innovative solutions and next steps for addressing a pressing and immediate leadership challenge. In a Case Clinic, a case giver presents a case, and peers or team members act as coaches, based on the principles of the U-process and process consultation.

Application

This peer-learning process can be used to address challenges where the case giver is the main decision maker. It can build a high level of trust and positive energy among a peer group and can be combined with mindfulness and listening practices for maximum effect.

Principles

- **Be specific.** The case should present a leadership challenge that is current and concrete.
- **Include a decision maker.** The case giver needs to be a key decision maker in the case.
- **Reinforce peer relationships.** The participants in the Case Clinics are peers, so there is no hierarchical relationship.
- **Practice listening.** Coaches don't give advice; instead they listen deeply.

Resources

- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapter 2. Oakland, CA: Berrett-Koehler.

Process

Setup

- **People:** This process works best with a group of 4–5 peers.
- **Place:** Select a quiet and private place, whether in person or online, for your process.
- **Time:** 60-75 minutes.
- **Materials:** Take notes in a journal and use a watch to keep time.

Steps

Step 1: Consider the roles (~2 mins.)

- *Case giver:* Share a challenge that is current, concrete, and important, and in which you are a key player/decision maker. Include your personal learning threshold (what you need to let go of and learn). You should be able to present the case in 15 minutes.
- *Coaches:* Do not try to “fix” the problem by offering advice; instead, listen deeply. Attend to the images, feelings, and gestures that the story evokes in you.
- *Timekeeper:* One of the coaches also manages the time.

Step 2: Intention statement by case giver (10-15 mins.)

- Take a moment to reflect on your sense of calling. Then describe your case using the following questions as a guide:
 1. *Current situation*: What are the key challenges or questions?
 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 may ask clarifying questions if needed.

Step 3: Stillness (~2 mins.)

- Listen to your Open Mind: What images/metaphors arose?
- Listen to your Open Heart: What emotions do you sense, and where are they in your body?
- Listen to your Open Will: What gestures might represent the essence of what you are hearing?

Step 4: Mirroring (10 mins.)

- Each coach shares what came up during the silence or while listening to the case.
- After listening to all the coaches, the case giver responds to what they said.

Step 5: Generative dialogue (20 mins.)

- Reflect together on the remarks of 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 their challenge.

Step 6: Closing remarks (8 mins.)

- By coaches: Share a final reflection.
- By case giver: How do I now see my situation and way forward?
- Acknowledgment: Share an expression of genuine appreciation to each other.

Step 7: Individual journaling (2 mins.)

- Write down what you learned.