



## REAL-TIME CONSULTING SESSION *INSTRUCTIONS*

**Objective:** To assist leaders in dealing with a critical professional challenge or opportunity

**Description:** In the session, participants are divided into small teams that provide on-the-spot consulting advice to one of their colleagues on a case they are currently dealing with. The case relates to a real and pressing issue, challenge, or opportunity they are facing. The issue is to be framed in a way that a group of 'peer-consultants' (other meeting participants) can identify practicable recommendations within a short period of time (approx. 1.5 hours). The session is an excellent opportunity for cross learning and for the case presenters to receive expert advice that they can apply when they return home.

The real-time consulting session involves three roles: case presenter, facilitator, and peer consultants. The facilitator and peer consultants will be assigned based on the nature of the case.

### **Role of Case Presenter**

- Identify a real issue, challenge, or opportunity you are facing that you believe your peers can help you address. The exact topic of the case can relate to your goals or to a practical and pressing issue at your organisation. Note that the more precisely you can define the question, the more likely you are to receive useful input.
- Prepare a case statement that: 1. describes the issue; 2. provides relevant facts and sufficient background; and 3. conveys your needs and expectations from the session. **A template has been provided below – again the more specific you can be, the better it is.**
- During the session, you will take 15-20 minutes to present and review the case statement, adding any additional information or details you feel are necessary for the peer consultants to advise you. Be sure to clearly state the results you are seeking from the session.
- Work with peer consultants during the session to answer questions, identify opportunities, brainstorm about solutions, etc.
- Towards the close of the session, work with the peer consultants to identify next steps for when you return home.

### **Role of Facilitator**

- Review the case prior to the meeting. If possible, communicate via email or phone with the case presenter prior to the meeting to pose clarifying questions and identify needs.
- During the session, briefly introduce the topic and case presenter. Invite the presenter to convey the contents of their case. Ensure that the presenter's desired results are clearly stated.
- Structure the discussion to reach the presenter's desired results. A possible structure could include: questioning and clarifications, reframing issues and desired results, brainstorming, exploration of possibilities, narrowing of options and actions, identification of next steps.
- Manage and facilitate the dialogue, ensuring that the discussion stays on task and is moving in the direction of achieving desired results. Ensure that all voices are heard.
- Keep to time.
- Assign a note taker to record all major points and outcomes. If required, give the notes to the rapporteur of the meeting.
- Conclude the small group session.
- Along with the Case Presenter, briefly report on the session to the large group (5 minutes per team), if required.



**REAL-TIME CONSULTING SESSION  
TEMPLATE FOR CASE PRESENTER**

**Case Title:**

**Name:**

**Organization Name:**

**Challenge or Key Issue to be Answered (please state it in two or three sentences)**

Example: To engage the Board of Directors beyond general meetings on matters including external relationship building, identifying growth opportunities and strategic planning.

**Current Situation & Background of organization (No more than two paragraphs)**

Example:

- It's been three years since the Board last took stock of its context and direction.
- There has been quite a bit of turnover. In the last 12 months, four Directors have departed. Five remain.
- My organisation doesn't need a big Board but we do need an effective Board. We should make sure Directors understand their role and contribution.
- I've done the start-up and wish to step down from my organisation soon. I will be resigning as CEO in late August. I've expressed my wish to join the Board upon my return in 2005.

**Issues to Discuss (No more than two paragraphs)**

Example:

- Time to move the foundation out of the establishment phase into growth.
- Charge the incoming Chief Executive with clear goals and targets.
- My organisation's internal operating environment is under pressure and demanding.
- My organisation's external environment is highly politicised and mainstream interactions are influenced by stereotypes surrounding local affairs.
- My organisation has pioneered social venture capital: now is the time to assess and celebrate successes.
- The new CEO will have a clean slate for operations, programs and staff hire/fire.