

## S-Lab: On-phone Case Clinic:

Applying Theory U based collective learning processes in virtual learning environments

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### Abstract:

A small group of community members<sup>1</sup> from Presencing Institute Community engaged in a long-distance collective learning process to deepen their understanding of Sustainability and Theory U. This learning was anchored in MIT Open Source course called S-Lab<sup>2</sup> (Sustainability Lab). The group met regularly on Skype once a week for 6 classes and 2 meetings between September to November 2009. The unique aspect of groups' learning was a live case-study offered by one of the participant (Mary Jean) from her organization- Soup of the Day. The group decided to create a generative learning space using Theory U based Case-clinic process. However, co-facilitating a case-clinic on-skype across the international time-zones and cultural dynamics surfaced unique challenges. In this short paper we have captured the learning insights that we gained in our first ever experiment of 'using on-phone case-clinic'. We hope that these insights would help other learning groups and communities in using case-clinics and other Presencing processes in virtual environments.

### Introduction: Case-clinic

Case clinic is Presencing tool generally used during prototyping phase of U-process. It guides 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. The Purpose of case clinic is to "help a colleague in responding to an important and immediate leadership challenge better and more effectively". (read more on [Presencing Website](#))

Owing to its intense nature, Case-clinics are generally held in-person (embodied) in a closed space with 4-5 people and for approximately 70 minutes. However, S-Lab was a virtual community connected through skype. Following are some insights about facilitating an on-phone case-clinic

- ✓ **Duration:** On phone case-clinic requires more time than an in-person one. The process is slow, contemplative and needs time for pauses, paraphrasing etc. Thus having two 2-hours sessions with a break (we had a week) in between helped. Also, prior awareness of agenda and time schedule helped participants in being more prepared and focused.
- ✓ **Pre-work:** It is helpful, if the case-presenter prepares and shares the story, context of the case (like Mary Jean did) and the specific areas of focus in advance. Furthermore, complex social case-studies run the risk of information overload. Thus it might help in keeping it simple (3-4 power point slides) using creative art forms to communicate the story. In such cases, we might need an additional call for the case-presenter to set the context and download details. Sometime, coaching and assisting the case-presenter in preparing the case might also help.

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<sup>1</sup> S-Lab team: Patrick McNamara (S-Lab anchor), Joyce Rankin, Mary Jean Netario-Cruz (Case-presenter), Sandra Lester and Manish Srivastava

<sup>2</sup> For summary of learning from S-Lab classes [click here](#)

- ✓ **Check-in and Ongoing Feedback**: Checking-in is important in the beginning. However, checking in between is also helpful to understand how participants are feeling. Since there is no visual exchange, ongoing feedback, sensing and appreciation becomes even more important.
- ✓ **Shared context and Community**: The case-clinic process is more focused when participants have some knowledge of each other's background, preferences and worldviews. Unlike in-person dialogue, an on-phone case-clinic provides lesser opportunities for tough conversations or healthy confrontations (storming) that is essential for team building. It may help for the group to consciously create such team development opportunities prior to organizing a case-clinic. Since the S-Lab classes preceded our case-clinic we got enough time to explore diverse perspectives, develop heart-felt connections and bring higher level of presence to the discussion.
- ✓ **Presencing Silence**: 5-10 min silence enables deep-level conversations. This is also something we could practice more in other ongoing conversations, even 3 minutes short breaks are helpful.
- ✓ **Creating a safe-container for the case-presenter**- Case-clinic process puts the case-presenter in a vulnerable spot and therefore it is very important to co-create a safe container. While, it is difficult to create it on-phone, we felt that empathetic listening, being fully present, offline conversations and peer-coaching support helped in co-creating safe-space at S-Lab.
- ✓ **Process and Content**: Paying attention to both content and process/feeling is important. Feelings need to be verbalized and articulated more in on-phone case-clinic. This requires some skill development and getting-to-know one another.
- ✓ **Check-out and Closure**- In the end we had lots of emotional exchange but no visual way to give assurance/appreciation. Perhaps we need to practice the open heart space in each call in some small way. Starting with hopes, aspirations, and appreciations builds the space and the skill to share other feelings as they arise.
- ✓ **Consulting and anchoring**- While consulting is a shared role, prior clarity on role of anchor/time-keeper is helpful. Consulting in on-phone case-clinic requires lot more patience, compassion and letting go (as we can't see how our message is being received). It helps to check for feedback on what we share. Patrick's role as an anchor was helpful throughout the S-Lab and case clinic.

On a whole S-lab Case clinic was very beneficial to all participants. Apart from learning about applying the U process to sustainability issues, we also gained deep insights in our 'self' as a leader/facilitator and the process of facilitating learning in virtual environment. Moreover, we made wonderful relationships across Canada, US, India and Philippines.