



CONVENE & CONNECT

Convening is the art of bringing the community (of practice) and relevant stakeholders together to connect members and engage them in meaningful conversations. The diversity of a community and a risk-free and inclusive environment help develop conversations and engage members.

Start small, create the conducive environment to convene and network people.

Proper community management to ensure diversity of views, prioritize equity for access to opportunities and resource and where everyone feels they belong and can actively participate.

Diversified, equity and inclusiveness environment where there is diverse representation, fairness and everyone feel valued and heard.

Activities oriented to developing the practice - Case Clinic

WHAT

Case Clinic

Because it is triggered by a need emerging from practice, the case clinic is the quintessential social learning activity.

The goal is to engage the collective experience of the group in the challenge of a member's case. The member benefits from the brainpower of the whole community, but everyone learns from the clarification of the challenge, the sharing of stories, and the discussion of advice.

WHY

Member would work together to solve real problems and to help onboard the member's application to new strategic tools or solution. This will deliver value directly to the members, who develop highly relevant new skills and knowledge, and to the business by addressing the problem brought to the group. These clinics also provided an excellent focus for the community: people enjoy helping each other to solve real, tangible issues.

HOW

Key success factors

- We recommend that the challenge be an actual one, and if possible one with urgency. This energizes the community.

- An important piece of pre-work is for case presenters to be very clear about the question they want to pose the group. The more precise the question, the easier it is for the group to provide useful and relevant assistance.
- We usually don't recommend a slide presentation about the case, which takes too long and can be boring. The member bringing the case is involved in all the details of the situation and they can easily overwhelm the group. It is important to limit the amount they impose on others. We often recommend creating a single visual, however basic, to represent the context in a synoptic way, with just the facts relevant to the case. The idea of the single visual is to help the community keep in mind the relevant dimensions of the situation during the whole activity.

The table below shows a typical case clinic protocol. It is indicative only and needs to be adjusted dynamically to move the process along. This protocol assumes that the community has about one hour, which is a reasonable time for a difficult challenge. The time actually required will depend on the complexity of the case, but the proportions will remain approximately the same.

Steps	Action	Time	Hints
1. Context	Presenter gives just enough context to frame the challenge, then poses a specific question to the group.	5–10	A simple visual can be helpful, but avoid slide presentation or lengthy descriptions at this stage.
2. Understanding	Group asks clarification questions to get a better understanding of the context and the nature of the challenge. Responding to these questions, not the initial introduction, is the main vehicle to convey the nature of the challenge.	15	Refrain from offering advice at this stage. But good clarification questions often shed a new light on the challenge.
3. Sharing related experience	Group members share related experiences and stories.	0–15	This timing depends on the number of members with related experiences.
4. Advice	Group members give advice and discuss each other's advice from the perspective of their own experience.	15	To keep things grounded in experience, encourage members to provide their advice in the form of stories, saying what they did when in a similar position.
5. Summary	Presenter summarizes insights and advice they are taking away.	5	This is something to follow up on at a later meeting.

Follow-up

All activities in this chapter can benefit from follow-up to provide continuity, but it is specially the case when receiving help on a personal challenge from a community that has an ongoing commitment to learning together. A few weeks or months after a case clinic, the community can ask the case presenter to report on what actually happened.

There is a lot of value in such following-up. It shows a sustained commitment to the success of the member receiving help. The community is not just giving glib advice or brainstorming ideas; it is ready to see its suggestions through to implementation. The community also learns a lot from seeing how its advice does or doesn't work out in practice.

Variations

Rotating clinics. Multiple presenters bring their respective challenges, and the community divides into the same number of groups. The presenters move from one group to the next for mini-clinics, then presenting to the whole group what they have learned from the process.

Delayed response. The presenter only listens to advice and to members' discussions of each other's advice, but does not respond or comment until after the entire advice phase. While this variation can deprive the discussions of the presenter's perspective, it can avoid the situation where the presenter feels a need to push back on every piece of advice defensively.

Exploring a new idea. A case clinic can also be triggered by a new idea, which a member is not quite sure about. The request is for the community to debate the potential of the idea from the standpoint of its practice. A community can provide a good context for such "wild exploration." Unlike a team, which is under pressure to accomplish a task and may not have the patience to consider something that is not ready for prime time, a community convenes a group of peers who can appreciate the promise of an idea and be willing to discuss it, even if it is half-baked. In the process, the idea can be refined, its practical implications explored, and its potential downsides noted. The idea can also gain legitimacy: running an idea by your community in a case clinic can give you more credibility when you propose it to your team or your manager.