

**Consultancy Protocol**

**Purpose:** A structured process for helping someone think more expansively about a particular dilemma

**Time:** 20 minutes (can be done in less)

**Roles:** Presenter, Consultants (One consultant also keeps time.)

**Components of a Consultancy Protocol Process**

**Step 1: Presentation of Problem of Practice – 2 minutes**

* Give an overview of the problem/challenge/dilemma
* Frame a question for the partners to consider

**Step 2: Clarifying Questions – 2 minutes**  
These are “who, what, where, when, and how” questions that can be quickly answered to better help the partner and presenter understand the dilemma.

* Partners ask questions for clarification and deeper understanding
* Partners ask questions to understand the content and context
* Presenter responds directly to the questions with factual, brief answers
* Some questions might include:
  + How much time does…?
  + Who is the…?
  + What resources did…?

**Step 3: Probing Questions – 3 minutes**These are “why” questions that are open-ended and intended to help the presenter think more deeply about the dilemma.

* Partners ask questions for clarification and deeper understanding
* Presenter answers when appropriate but makes note of the questions for further consideration
* Some questions might include:
  + What’s another way you might…?
  + What do you think would happen if…?
  + What sort of impact do you think…?
  + What is the connection between…and…?
  + What would have to change in order for…?

**Step 4: Discussion of the Problem – 5 minutes (presenter turn off camera and mic)**  
Partners discuss and brainstorm about the problem/solution, and Presenter listens and takes additional notes. Some questions might include:

* What did we hear?
* What didn’t we hear that might be relevant?
* What assumptions seem to be operating?
* What questions does the dilemma raise for us?
* What might we try if faced with a similar dilemma?
* What have we seen in similar situations?

**Step 5: Debrief – 3 minutes (consultants turn off mics)**

* Presenter reflects on what was heard
* Presenter shares what he or she is now thinking
* Presenter highlights specific ideas/comments that resonated

**Credit:**

Adapted from: Kentucky Valley Educational Cooperative. Retrieved from: https://microcredentials.digitalpromise.org/explore/framing-a-problem-of-practice