

TOOL

The Consultancy Protocol



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The Consultancy Protocol

Purpose

This protocol provides a structured way for a group or team to collaboratively think through a real dilemma or challenge brought by one member. It is designed to generate new perspectives, deepen understanding, and support more thoughtful decision-making.

When to Use

Use this protocol when a team member is facing a complex challenge and would benefit from the group's thinking. It is especially useful when conversations tend to jump to advice-giving, lose focus, or fail to fully explore the problem.

How to Use It

Follow the protocol step by step, maintaining the sequence and roles. The structure is intentional: it ensures the presenter's dilemma is clearly understood, creates space for individual reflection, and allows the group to explore ideas without immediately jumping to solutions. The facilitator plays a critical role in protecting the process—keeping questions clarifying (not probing), maintaining focus on the presenter's key question, and ensuring equitable participation. During the discussion, the presenter steps out of the conversation to listen and reflect, allowing them to hear perspectives without needing to respond. The protocol includes suggested timing options for 30-, 45-, and 60-minute meetings—select the version that best fits your context and adjust as needed. This protocol is most effective when participants engage with curiosity, build on one another's thinking, and focus on understanding before advising.

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30 min.	45 min.	60 min.	WHAT	HOW
1	2	2	<i>Opening</i>	Facilitator reviews protocol and adjusts time as desired by presenter or as fits the group. The group may decide to spend more time on the preparation section or in the discussion. Timing also depends on how many are in the group.
5	5	5	<i>Previous Presenter Report Back (optional)</i>	If desired, the presenter from the previous week's consultancy can report on how they used the ideas generated in their consultancy. Teams often feel invested in hearing what happens as a follow-up to the consultancy and a report back can meet this need.
2	3	5	<i>Presenter Preparation (optional)</i>	If the presenter knows ahead of time that they will present, then they can arrive to the consultancy with the dilemma written. If this is not the case, the presenter might want a few minutes to think and write in order to identify what they would like the group's support on.
5	8	9	<i>Presenter Shares</i>	<ol style="list-style-type: none"> 1. Presenter shares the dilemma—verbally shared or as a written document. If a written description is shared, presenter can also verbally add anything before or after the group reads the document. It's appropriate for the group members to take notes about what they're hearing. Presenter might also share an artifact such as a transcript of a coaching conversation, an email, or a plan for a conversation. 2. Presenter can ask for feedback or input in one area or key question. Asking for specific feedback or support can help a discussion stay focused and useful.
3	5	5	<i>Clarifying Questions</i>	<p>Group asks presenter clarifying questions.</p> <ul style="list-style-type: none"> • Clarifying questions are yes-no or require very short answers. • The facilitator needs to interrupt if probing questions are asked and can remind the group that probing questions can be noted and raised during the discussion.

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5	5	5-18	<p><i>Group Reflection and Preparation</i></p> <p><i>Silent planning and reading time</i></p>	<ol style="list-style-type: none"> 1.If the group is using a tool such as the Coaching Lenses, the presenter can ask that specific lenses be focused on—or the group can agree to divide up the lenses so that they will all be covered. 2.The facilitator restates the presenter’s request for specific feedback or input on one area, if this was requested, and reminds the group to focus on this area. 3.The group silently reflects on the presenter’s dilemma and prepares for discussion. It’s appropriate for group members to note questions and comments to contribute in the discussion. <ol style="list-style-type: none"> a. This time can be extended for an additional 20–30 minutes to do reading or research to inform the discussion. 4.Group can be prompted to write out a big understanding, question, or insight from their lens.
13	18	20	<p><i>Group Fishbowl Discussion</i></p>	<ol style="list-style-type: none"> 1.Presenter moves their chair outside of the circle and can take notes if desired. 2.The facilitator reminds the group of the presenter’s key question. 3.The facilitator can open this section by suggesting that each group member briefly (in about 1 minute) share their initial thoughts on the dilemma, and the group can whip around so that all can share a thought before opening into a less structured discussion. 4.In the discussion, group members can raise probing questions, share the insights they gained through using the lenses, and voice any other comments or reflections they came up with. 5.Facilitator needs to ensure that discussion stays focused on the presenter’s dilemma and, if requested, on their key question. Facilitator may also take actions to ensure equity of participation.
1	1	1	<p><i>One Minute of Silence</i></p>	<p>Group holds 1 minute of silence so that the presenter can collect their thoughts and return to the group.</p>
3	6	6	<p><i>Closing</i></p>	<p>Presenter shares any reactions, insights, and feelings about protocol or what was said; they don’t need to respond to questions that were raised in the group discussion. If time permits, group can share reflections on process.</p>

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