

DISCUSSION PLANNER

Making Meetings Work

Discussion with:

Date:

What do you want to discuss? Why is it important?

What is your objective(s) for this discussion?

How will you know whether the person/team has accomplished the task or is achieving desired results after the discussion? How will progress or success be measured?

What are the personal needs, tendencies, or characteristics of this person/team that you need to consider?

What are the opportunities/challenges in this discussion or the underlying situation?

Opportunities	Challenges

KEY PRINCIPLES

- Esteem
 - Be specific and sincere
- Empathy
 - Describe facts and feelings
- Involvement
 - Unleash ideas with questions
- Share
 - Disclose feelings to build trust
- Support
 - Help the person/team make decisions, but don't take over

MY APPROACH

- What problems do I anticipate?
- How can I prevent these problems from affecting the meeting?
- Which Intervention Techniques should I use?
 - Focus on the agenda/desired outcomes.
 - Encourage others to take turns talking.
 - Summarize ideas/actions.
 - Take a break.
 - Resolve an issue later.

INTERACTION GUIDELINES

- * **1. OPEN with desired outcomes and importance.**
- Welcome participants
 - Explain desired outcomes and their importance
 - Explain the consequences of not achieving outcomes
 - Review agenda

- Make procedural suggestions
- Check for understanding

- 2. CLARIFY information.**
- Provide information
 - Ask what information others have
 - Ask others for their issues or concerns
 - Summarize

- Make procedural suggestions
- Check for understanding

* Time allocation

3. DEVELOP ideas.

- Ask people for their suggestions
- Build on others' ideas and explore alternatives
- Offer your own ideas
- Summarize

- Make procedural suggestions
- Check for understanding

4. AGREE on actions.

- Choose the best ideas
- Specify how to take action
- Ask people what resources or support they need

- Make procedural suggestions
- Check for understanding

5. CLOSE with review and set follow-up.

- Summarize decisions
- Plan how to check progress
- Thank participants

- Check for understanding

REFLECTING ON THE DISCUSSION

- What one thing did I say or do particularly effectively (for example, to identify purpose and importance or use Key Principles)?
- What one thing could I say or do more effectively next time?

