

DISCUSSION PLANNER

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

MY APPROACH

- 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

Use this space to plan your approach.

INTERACTION GUIDELINES

* 1. OPEN

*Time allocation

- State purpose of discussion
- Identify importance (impact on/benefits to person, team, organization)

- Make procedural suggestions
- Check for understanding

2. CLARIFY

- Seek and share information about the situation/task
- Identify issues and concerns

- Make procedural suggestions
- Check for understanding

3. DEVELOP

- Seek and discuss ideas
- Explore needed resources/support

Make procedural suggestions

Check for understanding

4. AGREE

- Specify actions, including contingency plans if appropriate
- Confirm how to measure progress

Make procedural suggestions

Check for understanding

5. CLOSE

- Highlight important features of plan
- Confirm confidence and commitment

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?

ONGOING OBSERVATION, FEEDBACK, AND SUPPORT

Actions we agreed to (who will do what by when):

Person/Team	Me/Others
<p>Ways we'll observe performance:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Periodic updates <input type="checkbox"/> Direct observation (me or others) <input type="checkbox"/> Self-report <input type="checkbox"/> Other 	<p>Feedback on performance (STARs)</p> <p> Situation/Task ★ Action ★ Result</p>
<p>Ways we'll measure results:</p> <ul style="list-style-type: none"> • Quality—Direct observation (me, partners, customers), customer survey results, error rate, number of orders filled correctly, amount of rework, other • Quantity—Units produced, sales made, number of calls taken/placed, downtime, billable hours, other • Cost—Cost of scrap, actual vs. allowed expenses, expenditures vs. budget, cost per unit produced, other • Timeliness—Deadlines met, response time, processing time, milestones met, weekly targets met, other 	<p> Timely ★ Balanced ★ Specific</p>

LB3Z

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