

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
<ul style="list-style-type: none"> <input type="checkbox"/> Esteem Be specific and sincere. <input type="checkbox"/> Empathy Describe facts and feelings. <input type="checkbox"/> Involvement Unleash ideas with questions. <input type="checkbox"/> Share Disclose feelings to build trust. <input type="checkbox"/> Support Help the person/team make decisions, but don't take over. 	<p>Use this space to plan your approach.</p>

Interaction Guidelines*	
<ul style="list-style-type: none"> <input type="checkbox"/> Open <ul style="list-style-type: none"> • State purpose of discussion. • Identify importance (impact on/benefits to person, team, organization). • Make procedural suggestions. • Check for understanding. <input type="checkbox"/> Clarify <ul style="list-style-type: none"> • Seek and share information about the situation/task. • Identify issues and concerns. • Make procedural suggestions. • Check for understanding. <input type="checkbox"/> Develop <ul style="list-style-type: none"> • Seek and discuss ideas. • Identify needed resources/support. • Make procedural suggestions. • Check for understanding. <input type="checkbox"/> Agree <ul style="list-style-type: none"> • Specify actions, including contingency plans if appropriate. • Confirm how to measure progress. • Make procedural suggestions. • Check for understanding. <input type="checkbox"/> Close <ul style="list-style-type: none"> • Highlight important features of plan. • Confirm confidence and commitment. • Check for understanding. 	<p>Use this space to plan your interaction.</p>

*Allocate time for each interaction.

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?

