

Pre-conversation Checklist

MENTALLY

CHECK YOUR MIND-SET

Be positive, but also honest with yourself about how difficult the conversation may be.

CONSIDER THE OTHER POSITIONS

Look at the situation from your counterpart's perspective: What do they want / what's causing their concerns

VENT

Get your emotions out beforehand so you can be calm during the conversation.

DO

- Be positive & focus on what the team stands to gain from the discussion.
- Assume you have something to learn.
- Ask a trusted coworker for input if you're at a loss about what your counterpart is thinking.
- Identify places where you see eye-to-eye (find common ground)
- Get your feelings out ahead of time so you'll be more centered and calm.
- Come up with a list of questions you want to ask when you sit down

DON'T

- Label the conversation as "difficult."
- Sugarcoat what's going to happen.
- Assume you can know everything your counterpart is thinking ahead of time.
- Vent to a friend or work colleague who typically riles you up.

STRATEGICALLY

PLAN YOUR MESSAGE

Think about what you'll say ahead of time.

Identify the outcome needed

ANTICIPATE MULTIPLE SCENARIOS

Play out various ways the conversation might go.

DO

- Plan how you'll approach the conversation—literally what you will and won't say.
- Focus on a shared goal.
- Find a trusted colleague with whom you can do a few role-plays.
- Test out phrases you might say.

DON'T

- Script the entire conversation—just jot down notes and key points.
- Assume you know how the conversation is going to go.

LOGISTICALLY

PICK THE RIGHT TIME

Choose a time when you and your counterpart can be unrushed and calm.

SELECT THE RIGHT PLACE

Look for somewhere you can meet without interruption.

DO

- Pick a time when you and your counterpart won't be rushed.
- Consider an initial meeting to hear each other out, and then schedule a follow-up time when you can focus on problem-solving.
- Talk in person, or at least on the phone.
- Try a change of scenery—going to a coffee shop or taking a walk.

DON'T

- Have the conversation over e-mail.
- Try to talk to your colleague when emotions are high.
- Have a fight in a group setting (such as in a team meeting).
- Choose a "turf" setting where you or your counterpart has a power advantage.

Pre-conversation Checklist

Make use of the SBI+R Feedback Model

Describe the **situation (S)**

Be specific about the observed **behavior (B)**

Explain the perceived **impact (you, others, task) (I)**

Check for **understanding (+)**



Recommend action steps **(R)**

WHEN YOU WANT YOUR COUNTERPART'S INPUT ON YOUR IDEAS

- I'd love to hear your reaction to what I just said.
- What flaws do you see in my reasoning?
- How do you see the situation differently?

WHEN YOU NEED TO MOVE THE CONVERSATION ALONG

- You may be right, but I'd like to understand more
- I have a completely different perspective, but clearly you think this is unfair, so how can we fix this?
- Can you help me make the connection between this and the other issues we've been talking about?
- I'd like to give my reaction to what you've said so far and see what you think.
- I'm sensing you have some intense emotions about this. When you said "X," I had the impression you were feeling "Y." If so, I'd like to understand what upset you. Is there something I've said or done?
- This may be more my perception than yours, but when you said "X," I felt...

WHEN YOU NEED TO DRAW OUT YOUR COUNTERPART'S PERSPECTIVE

- What about this situation is most troubling to you?
- What's most important to you?
- Can you tell me about the assumptions you've made here?
- Can you help me understand your thinking here?
- What makes you say/believe that?
- What would it take for us to move forward?
- What would you like to see happen?
- What ideas do you have that would meet both our needs?
- If this were completely in your control, how would you handle it?

WHEN YOU NEED TO PUT OFF THE CONVERSATION

- I understand you want to discuss this, but now isn't the best time. Can we schedule something soon so that we can talk it through?
- I can see you're really upset about this. Can we talk about this when we're both calmer?
- I'm not ready to have this conversation right now. I'm going to step outside to clear my head, and then perhaps we can meet tomorrow to talk about this.