

Strategic Conversation Planner

Purpose

During the workshop, you will be practicing having **a conversation** in which you are making a proposal or attempting to influence action with a decision maker, or small group of decision makers. The target audience could be someone you currently work with or a new contact for you. To prepare for these practice sessions, you will need to gather information and bring it to the workshop.

Come Prepared

Do a thorough job of answering these questions on the next page. You will be referring to this information throughout the workshop and sharing this information with other participants. The value you get out of the workshop is dependent on the completeness of this Planner.

Selection Criteria

Use the following criteria when selecting your targeted listener:

- In this program, you will be practicing having **a conversation** in which you are making a proposal, or attempting to influence a decision. You will **not** be practicing making a formal one-to-many presentation.
- For your practices, select a decision maker you plan to have a conversation with. This will help you maximize the benefits you achieve during the practice sessions.
- To gain the most value from this program, we recommend that you choose a challenging topic or person to use as a model for practicing techniques.
- You can also try the skills on a meeting you've already conducted. This is a great way to test the techniques.

Please bring one printed copy of this planner with you.

Your Name

What's the topic for the meeting/call?

Content	Notes
Name of person or group you are meeting with, title, and role/department.	
What is the problem you are trying to solve or opportunity you are seizing? What are you proposing/recommending?	
What is the value of your proposal or this decision to them? (Business, personal, other?)	
What are the positive drivers that support your proposal? e.g. advocates in group, aligned with the listener's business needs, etc.	
What obstacles will they bring up about your proposal?	
What's the best outcome you can expect from this meeting? E.g. approval? What decision needs to be made?	
How will I organize my discussion to achieve my goals and influence my listener?	
Situation: What is going on in the business that is critical to this person as it pertains to the topic you plan to discuss?	
Complication: What about the situation (changes, pressures, demands, and opportunities) is causing problems for this person and/or the business?	
Implication: What are the consequences to the business of not acting on the issues described in the complication?	
Position: What will you propose, or request to discuss, to address this implication?	
Action: In this meeting, what do you want this person to discuss, explore, share, or do?	
Benefit: What benefits will the proposal you described above produce for this person or overall business?	