

Chapter 8

Conversation Preparation Checklist

If you fail to plan, you plan to fail. — *Benjamin Franklin*

Sonya, a healthy 94-year-old, made an interesting choice in preparing for old age. When she was 80, she noticed several of her contemporaries were succumbing to the plight of falling and not being able to get up. She did not want to experience this problem, so she began lowering herself to the floor twice a day and then getting up safely. This activity strengthened her muscles, gave her practice and increased her confidence to manage a potential problem. She was investing in preparedness.

If you have ever introduced someone at a meeting, proposed a toast at a wedding or delivered a eulogy at a funeral, chances are you didn't show up unprepared. When a communication is very public and important, most people take some time to plan, prepare and even rehearse what they will say.

Our day-to-day conversations with our bosses or colleagues, clients, spouses, children, family or neighbours can be even more life-altering than a one-off event yet often we “wing it.” When we don't take the time to prepare for these situations, things can go wrong. It is important, for instance, to identify the objectives of having the discussion, and the results we expect to flow from the exchange. You may not need to write everything out or type a script before every conversation; however, it can be helpful to be clear about what your intention is in having a conversation, clarify the results you are looking for and assess what you can do to make the conversation as effective as possible.

People often give me an example of a situation in which they don't know how to communicate and ask, “What is the right thing to say?”

I suggest they concentrate not on what the right thing is to say but on the effective way to communicate in the situation.

Considering the following factors will help you to prepare:

- Who are you communicating with?
- What role do you have with them?
- What is your relationship like with them?
- What is their style of communication?
- What result are you striving for?
- Are there cultural considerations that need to be addressed?
- What are the possible consequences — positive and negative — of engaging in the interaction?

Considering these aspects will help determine whether it is even appropriate to have the conversation.

For example, in today's society children live at home later in life than they used to. There is a phenomenon occurring when parents phone their adult child's employer to discuss job issues. If a parent were to go through the considerations above, unless there is a health issue that prohibits the child from communicating with his employer, a parent does not have a role in this scenario and would be best to let their son or daughter handle the matter directly with the employer.

On the following page is a checklist that you can use to help you plan ahead for those important discussions.

Conversation Preparation Checklist

Before you have an important conversation, assess the considerations below to determine which of them apply and how to manage these elements to give you the best odds of having a successful interaction.

1) What is your intention in having the conversation?

- | | | |
|--|---|---|
| <input type="checkbox"/> share information | <input type="checkbox"/> get approval | <input type="checkbox"/> instruct |
| <input type="checkbox"/> get information | <input type="checkbox"/> provide a response | <input type="checkbox"/> express feelings |
| <input type="checkbox"/> ask for help | <input type="checkbox"/> ask permission | <input type="checkbox"/> introduce self |
| <input type="checkbox"/> solve a problem | <input type="checkbox"/> persuade | <input type="checkbox"/> get to know someone better |

If not one of the above, write your own intention.

2) What is the best time and location for this conversation? (Would it be best to make an appointment with the other person or approach him with no set time?)

3) What is your goal? In other words, what outcome, action or result would you expect as a result of this conversation?

4) What is the benefit or significance of the conversation for the other party? (What is in it for them — will they do their work better? Avoid a problem?)

5) What data or information would improve the clarity of the communication?

6) What is your mood like now? How you feel affects your tone and body language. How might that influence your effectiveness? (Do you need to postpone the conversation until you have better self-control?)

7) What kind of tone will help you get your message across and what do you need to avoid so you don't put the other person off?

- Volume: quiet — loud
- Pauses: Will you need some? Do you need to listen?
- Pace: fast — slow

Tonal Variation: How much intonation will you need to make yourself understood? What parts of your message do you need to emphasize?

8) Body Language — What do you need to keep in mind about your body language in this conversation?

Facial expression: smile — or more reserved?

Posture

Sit or stand?

Is a handshake appropriate?

9) What questions would be helpful to pose to the other person to draw out information or to understand his interpretation of the message or other hidden information? Are you in a passive, assertive or aggressive state of mind? Will this mindset help you or hurt you? How can you shift to assertion?

10) What other considerations do you have for preparing for this particular conversation?