Pre-Meeting Preparation

Who should be invited to the meeting?

1. Who stands squarely downstream and therefore will be impacted by any decisions being made? Who is the customer (internal or external)? Question mark should be outside of parenthesis
2. Who is standing right at the juncture where things are happening?
3. Who has a perspective you need to understand before making the decision?

**Issue/Problem:** Provide a two-sentence description. Is it a challenge, opportunity, decision, strategy, or recurring problem?

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**Urgency Level:** What’s at stake?

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Highlight who/what this affects.

* Revenue
* Products
* Services
* Customers
* Individuals/Teams
* Organization/Company

**Future Impact if issue is not resolved:**

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**Ideal Outcome**: If everything goes according to plan, what results will be seen? What and who will be affected?

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**Relevant Background Information**: Summarize with bulleted points. How, when, why and where  this issue started? Who are the key players and how do you see their roles?

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**What has been done up until this point:** What steps (successful/unsuccessful) have taken place? What have you tried?

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**Current Problem Status**:

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**The Option I am considering:** What option would I decide right now without input from the group?

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**The Help I want from the group is:**

**What are my potential blind spots?**

1. Questions to allow me to see different perspectives
2. Consequences for my solution I may have missed
3. Strengths of my proposed solution
4. Additional Resources to consider
5. Alternative solutions

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