

## Crucial Conversations Worksheet

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### ❖ **Step 1 Get Unstuck**

#### *What is the right conversation?*

1. What is the conversation that I am not holding or not holding well (as in, I am in my very own version of Groundhog Day)?
2. How might I be acting out this situation?
3. What is at the heart of my concern? (One or two sentences)
4. What is the right topic to discuss?

### ❖ **Step 2 Start with Heart**

#### *What do I really want?*



1. What do I really want for myself? The other person? The relationship?
2. How would I behave if I really did want that?
3. Am I making a Sucker's Choice? (A sucker's choice is the worst of an either/ or situation. It sets up a false dilemma.)

### ❖ **Step 3 Learn to Look & Make it Safe**

#### *Silence & Violence*

1. Is safety at risk? What are the indicators?
2. What is my usual style with this person in a similar situation (do I go into silence or violence)?
3. What is our mutual purpose? (Are we willing to create one?)

4. Is there mutual respect? If not, what will it take to create it?

❖ **Step 4 Master My Stories**  
*Uncovering our Stories*

1. Am I telling a Victim, Villain, or Helpless Story?
2. What am I pretending not to notice about my role in the situation?
3. Why would a reasonable, rational, and decent person do what they are doing?
4. What should I do right now to move toward what I really want?
5. What story might the other person be telling about me?

❖ **Step 5 STATE my Path**  
*Delivering the Message*

1. Share my Facts: Start with, "I have noticed that...."
2. Tell my story as a *Story*, not as a *Fact*. Use statements such as "I am beginning to wonder...."
3. Did I ask a question—then ask some more so that I can understand their reasonable, rational and decent thought process. For example, "How do you see the situation....?"

4. Did I remember to talk tentatively and encouraging testing (of your story)?

❖ **Step 6 Explore Others' Paths**  
*Understanding Their View*

1. What did they see and hear?
2. What did they tell themselves?
3. What actions did they take?

❖ **Step 7 Move to Action**  
*Who does What by When with Follow-up*

1. If appropriate, decide in advance how the final decision will be made (what decision making model will be used?)

**Common Decision Making Models**

**Command:** One person decides with no involvement from others.

**Consult:** Everyone gives input, then a subset of one or more make the decision.

**Vote:** All have a voice but the majority rules.

**Consensus:** Everyone must agree to support the decision.

These options represent different levels of involvement, from one to everyone. Increased involvement adds to the benefit of increased commitment and the pain of decreased efficiency. Choose the level of involvement that yields the greatest benefit while minimizing pain as possible. Be very clear and up-front how the decision will be made; what decision making model will be used.

# Applying Crucial Conversations<sup>1</sup> Principles in a Meeting Context

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## Pre-Meeting

Think Through:

**Purpose** (Why are we meeting and on what topics?)

**Outcomes** (What will we achieve in the end?)

**Steps** (What is the flow or agenda?)

- Regarding Outcomes ask yourself, “What do I really want as a result of this meeting? What do I need people to know? How do I need them to feel? What, if anything, do I need them to do?”
- Based on the above, who has mutual purpose with this and should attend? (Remember there are trade-offs here so involve the minimal number of people possible to get the best decision in the time allotted.)
- Publish the purpose, outcomes and steps to participants in advance of the meeting invitation. Label each agenda item with the following if a decision is required: How will the decision be made? (Consensus, Consult, Vote, or Command-See text box). One possible outcome around a given topic may be to simply create dialogue on a given topic and fill the pool of meaning without necessarily having to push to closure or to a decision at that time.

## During the Meeting

- Reiterate the Purpose, Outcomes, and Steps at the outset and ensure that there is Mutual Purpose around them.
- Stick with the steps you outlined and expressly Make it Safe for others to challenge the process if it seems as if what is being discussed is not fulfilling the stated Purpose or leading to one of the Outcomes.
- Appoint someone to pay specific attention to the *quality of the process as opposed to just tracking the content*. Everyone in the group however should be on the lookout for signs of silence or violence. If you see any, *stop talking content and fix the process*. For example, if you see signs of debate or surrender, this means that you have a problem with the Mutual Purpose. Ask yourself, is this a clear problem or a misunderstanding? Then deal with it accordingly.
- Promote the use of STATE skills to make points (Facts first then interpretations) and balance those with good inquiry skills (i.e. Asking good questions, paraphrasing, mirroring, and priming). Groups will tend to do more advocacy rather than practice inquiry so just Exploring Others Paths will improve the effectiveness of most meetings.
- Move to Action on every agenda item by documenting who does what by when.

## Post Meeting:

- Follow up!

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<sup>1</sup> From Crucial Conversations, by Kerry Patterson, Joseph Grenny, Ron McMillan, & Al Switzler