PRECONSULT GUIDE

CLIENT_

CONSULTANT _

DATE _____

Fuzzy Situation Provide a high level description of the fuzzy situation. What's going on?



DISCOVER EXPLORE THE OPPORTUNITY

WIBGI... (Wouldn't It Be Great If...) List challenges, opportunities, goals, wishes, dreams, desires, and other fuzzy situations that you might like to try and do something about. Explore preferred outcomes and ideal futures.

What key challenges are you dealing with? What could be improved? How would you benefit? What are the recurring issues? What opportunities are on your radar? What is changing?

What would you do if you knew you could not fail? What do you hope to accomplish? What would you like to do differently? If this problem were solved, what would you gain? What do you want to achieve with this session?

Clarify the opportunity. Clarify a visionary goal that you would like to focus on. This should describe an ideal future that connects to the desired outcomes for the session.

| 2 DESIGN GATHER REI P.L.A.Y. List as many facts and insights the Consider people, processes, places, and What is a brief history of the situation? What is the present situation? What is the impact? | |
|---|--|
| PEOPLE | LANDSCAPES |
| People, groups, organizations, constituents | Environments, physical, social, political, digital |
| ACTIVITIES | YIELDS |
| Processes, verbs, actions, interactions | Objects, inputs, outputs, nouns, (in)tangibles |

P.L.A.Y. with purpose Circle the most important or relevant facts & insights above.

DEVELOP IDENTIFY THE KEY CHALLENGE

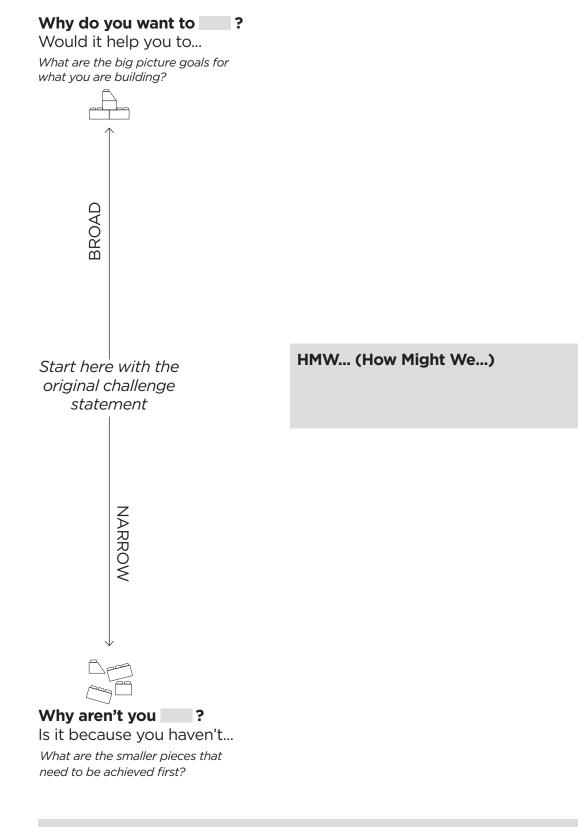
HMW... (How Might We...) Use facts and insights to create a list of challenges. As you identify a challenge, reframe it as a question, begin with "How might we...?"

What is the essence of the challenge? What is this really about? Why is this interesting or relevant? What's stopping us from doing this already?



DEVELOP IDENTIFY THE KEY CHALLENGE

Bricks and Towers Create an assessment of the selected challenge by identifying the bricks (explore why aren't you...?) and the towers (explore why do you want to....?).



Choose a focus. Circle a key challenge above to further explore in the session.



DELIVER PLAN THE SESSION

Write the key challenge statement that will be addressed in the session. Identify who should attend and what information is relevant.

HMW... (How Might We...)

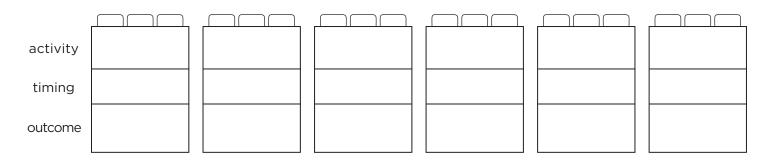
PEOPLE

List participants who should attend the session

CONTENT

List information relevant/required for the session

AGENDA Plan the activities and amount of time needed for each step. Clarify the outcomes for each activity.



NEXT STEPS Identify what next steps need to be taken prior to the next meeting. Consider: information to collect and share, scheduling, inivitations, pre work, location...

| WHAT will be done | HOW will it get done | WHO will champion | WHEN will it be done |
|----------------------|--------------------------------|-----------------------------|-------------------------|
| | | | |
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