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Checklist #5: Planning a Discovery Meeting

These planning guidelines cover the business of the data collection phase and help you prepare for any resistance you might get:

1. **Asking questions is an active occasion for learning. Use the meeting as an opportunity to deal with resistance and generate interest and commitment.**

2. **The response you get provides valuable data on the ultimate implementation of your expertise. Notice how the client manages the discussion with you:**
   - How much interest and energy are there on this project?
   - On which points is the client uneasy or defensive?
   - On which points is the client open to learning and change?
   - Where is the client unrealistic in estimating the ease or difficulty of some action?

3. **What is your understanding of the presenting problem or possibility? Now, based on your experience, what do you think your layers of analysis will yield?**
   - *Layer 1:* What technical or business problems is the client likely experiencing? What client assets or possibilities exist?
   - *Layer 2:* What are others in the client's organization likely contributing to the problem? Who are the other likely actors in the problem? What are others in the client's organization likely contributing to the collection of assets and possibilities? Who are other likely contributors?
   - *Layer 3:* What is the client doing that is helping to create the problem or prevent it (unknowingly) from being solved? What is the client doing to hold back on the possibilities?

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4. **What organizational folklore, history, and culture surround this project? Who are the ogres and angels in the client's setting? Acceptance of the folklore as truth is part of what blocks resolution. Identify areas of potential blind spots.**

5. **You can support and confront during the meeting:**

   - What support can you give the client at this point? Examples: make tentative recommendations, offer personal encouragement and assurance, acknowledge difficulties, describe similar situations you have known, thank the client for being candid with you?
   - How might you confront the client in this meeting? For example: are you not getting good data, is the client over answering questions and controlling discussion too much, is the client omitting key areas to discuss or answering questions with one-word answers, are there constant interruptions in the meetings, is the client skipping around too much, does the client not believe in the project or play down the seriousness or implications of the problem, are there negative attitudes about consultants in general?

6. **What nonverbal data can you look for? What in the setting of the meeting carries a message on client commitment and involvement in your project?**

7. **What data do you want to collect about how the organization is functioning?**

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