ChangeWise
Pioneer in Leadership Agility

ACTION PLANNING MEETING

Recommended Agenda (~1.5 hours)

1. **Debrief interim conversations**: Debrief the conversation your client has had with their manager. Also debrief the conversation(s) they have had with anyone else about puzzling or troubling feedback items.

2. **Finalize the Action Plans**. Do one leadership practice at a time. Your client can do the writing. However, it is often difficult for clients to think thinks through and write at the same time. It often works best to have the coach make notes, checking in with your client as you go along. However, you do it, the keys are for the client to feel ownership of the result and for the items to: However, you should monitor their writing process to make sure that what they put down is (a) a leadership practice (requiring personal change) and not a task or initiative, (b) be behaviorally specific, and (c) include underlying mindsets as well as observable behavior. For instructions on the details of how to use the action plan template, see page 11 of the Development Planner.

3. **Review and update leadership initiatives.** Have your client go back to the first page in their Development Planner. It will now be about 6-8 weeks after they originally filled out this page. Have them review these initiatives and update them where needed. The Pivotal Conversations initiatives, in particular, will probably need to be updated. Then have your client go through them and think through how their chosen practices will increase their effectiveness in carrying out their initiatives.

4. **Plan to engage others in the coaching process.** Suggest to your client that they pick 1-3 people to approach about working with them in the following way: About once a month, they will initiate a **brief** conversation with each individual and ask them for feedback on how they are progressing on their leadership practices. This approach tends to accelerate change in several ways: Regular feedback increases their awareness and determination, and helps clients continue to hold themselves accountable for their action plan. In addition, those who are engaged in this kind of process are more likely to notice the changes being made. Your client may also want to share their three leadership practices with others, including their direct reports.

5. **Begin coaching** (if there is time), focusing on your client's action plan and, most likely, one or more of their key leadership initiatives.

6. **Frame the practices by using the Leadership agility 360 framework.** If and when it seems relevant for your client, use the Leadership Agility model to frame the practices they have chosen. The arenas are usually the easiest to understand. However, if your client's chosen practices amount to developing from one level to another, this will be relevant to highlight as well. When appropriate, you might ask them to read relevant chapters in the book.