

Can you really make a W.I.S.E. Choice in a meeting?



Yes, if you follow this approach!

By Dan Kowalski

Use this simple approach to make W.I.S.E. Choice in any situation

"The majority of meetings should be discussions that lead to decisions."
Patrick Lencioni¹

Introduction

This eBook provides the process and suggested agenda for every type of decision meeting outlined in the book *W.I.S.E. Choices at Work*. I will outline how to plan and conduct the right session when the answers to the 5-Minute Question create the need for more deliberate decision making. Session applies to both the 1-Hour Meeting and 1-Day Workshop.

Why you need this approach

The diagram below shows that few decisions can use your typical decision-making approach. You can use your typical approach when have a low impact of choosing wrong *AND* low uncertainty about how the choice will perform. The book, *W.I.S.E. Choices at Work* provides a 5-Minute Question to test whether you have made a W.I.S.E. Choice. This means:

The decision maker **Weighed** the downside of the choice to put the upside in perspective.

The decision maker has been **Informed** by those who will use the choice.

The decision maker has considered the **Sufficient** characteristics for choice to succeed.

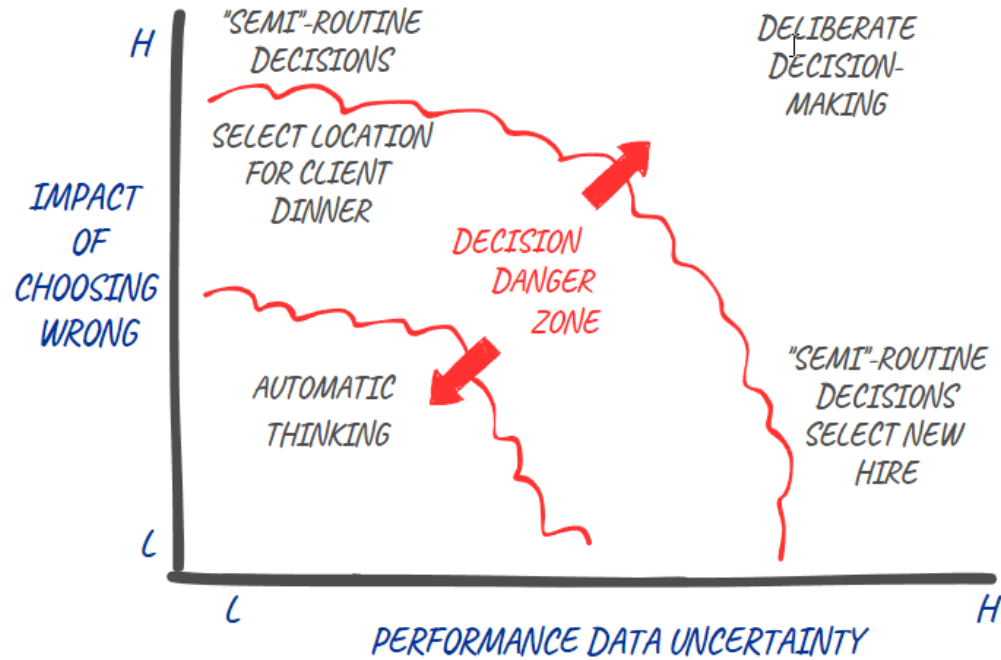
The decision maker identified how to make the choice **Effective**.

What you can expect

This eBook provides a proven approach for conducting any type of meeting related to making W.I.S.E. Choices. It includes agendas and preparation required. It does not cover all the decision-making techniques. You will need to refer to the book *W.I.S.E. Choices at Work* to learn the details for each approach.

¹ American Writer

The Decision Landscape and the Decision Danger Zone



Note: The subjective scales range from Low (L) to High (H)

You can run an effective meeting with just 2 steps!

"I don't do meetings."
*Karl Lagerfeld*²

Challenge

Meetings have gone beyond serving as a necessary evil. They have become a default solution that wastes everyone's time. Karl Lagerfeld had the luxury of not doing meetings.

Situation

Most non-routine decisions require input from other people. This means holding a meeting to share viewpoints and discuss issues. Everyone knows what to do in meetings. Actual practice turns out differently. To me, it seems people just assume everyone else will follow 'the rules,' but have never codified what rules to use.

Solution

You need just two steps to conduct effective decision-making meetings.

1. Use a defined and repeatable meeting process. This also means making the meeting rules clear. (Building them into the pre-read of the agenda helps.) I will provide a recommended bare minimum of meeting process in the next section.
 2. Find the appropriate W.I.S.E. Choice session that matches your situation to know what agenda to use. I have provided every agenda you will need.
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² German Designer

Make your decision-making meetings work

*"Meetings are indispensable when you don't want to do anything."
John Kenneth Galbraith³*

Introduction

John Kenneth Galbraith had good reasons for saying what he did. We must have meetings to make most decisions. Therefore, we need to make them productive. Some basic process thinking helps to create an effective meeting. Don't worry, even if you hate processes, I think these basics will help. Here are my tips for preparing for effective decision meetings.

A quick definition

A process is a set of steps to convert input into an output. This means we must identify the input for the meeting, the desired output of the meeting, and, of course, the steps. I will start with meeting inputs and outputs.

Required input for a decision-making meeting

Do Not hold any of the sessions in this eBook unless you have the required starting point. These inputs come from either the 5-Minute Question discussion or the 1-Hour Meeting output. Until you have the right input in writing, do not plan any deliberate decision-making sessions. I have identified the inputs for each type of meeting outlined in the W.I.S.E. Choices book.

You will also need to prepare the participants to engage productively in the session. For me, this means providing pre-reads and, at times, pre-work. As a bare minimum, they must know the agenda and why they must attend. I will provide ideas for creating meaningful pre-read and pre-work.

If participants can't complete pre-work prior to the session, then it will often take multiple sessions to produce the expected output.

³ American Economist

Expected output from a decision- making meeting

Each session format has a clearly defined goal. You should let people know this. Typically, this will appear on the agenda. Many times, the meeting may produce new insights that change the meeting goal. I have outlined some of these potential deviations. You (or the meeting facilitator) must be prepared to make real-time adjustments in any session. You should also alert the participants to the potential for adjusting the agenda topics as the session unfolds.

Please know that you will still need to assess what you learn in any session and determine the next steps or what the W.I.S.E. Choice will be.

The general process steps for a successful meeting

A general meeting flow has these steps:

- Prepare participants for effective engagement. The minimum preparation is having an agenda, but often includes pre-read and pre-work. I have outlined what this looks like for every decision meeting.
- Kick off meeting with an Agenda review/ratification along with a reminder of the meeting process and Ground Rules. **Note:** This means you must have an agenda for every meeting. (A suggested list of Ground Rules appears at the end of this document.)
- Cover all agenda topics.
- Review action items with what, who, and when.
- Conduct a Plus/Delta on the meeting and meeting process.

Note: The meeting 'starts' with preparation, NOT kicking off the meeting.

I have tried to include as much timing information as possible, but prepare for timing to shift especially in longer meetings.

Supporting roles for meetings

I recommend using a facilitator when you:

- Have important input to provide to the decision discussion.
- Suspect people will not follow the meeting rules.

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- Have seven or more people attending the meeting.

I also suggest having someone serve as a notetaker or alternatively, you can "invite" a voice-to-text bot from any of the various meeting platforms.

Supporting Environment and Elements

Henri Lipmanowicz and Keith McCandless wrote an interesting book entitled *The Surprising Power of Liberating Structures*⁴ that outlines many suggestions for creating effective meetings. One framework they offer covers the idea of macro- and microstructures along with elements. Macrostructures cover the location of the meeting, e.g., an office versus hotel. Microstructures include the type of room the meeting uses, e.g., a boardroom versus a classroom. Meeting elements include seating arrangement and support materials like easels, whiteboards, post-it notes and markers. I have incorporated some of these ideas into all the agendas. I encourage you to develop your list of "must haves" for your decision-making meetings.

A note about handling an option's downside

All options will have some level of downside. Every organization has a different tolerance for risk. Before looking at any options, the decision-making team should discuss or review their approach. This typically covers what level of likelihood of occurrence and what level of impact requires attention.

⁴ <https://www.liberatingstructures.com/>

How to navigate this eBook.

You don't have to read everything. Use this table to find what to read next.

When you have this starting point...	And you have this situation...	But you need to...	Go here:
Zero options	Know the need to create the option	Jumpstart the group's creativity	Mindset opening (to embrace creativity)
	Willing to use creativity	Clarify what you have and what you need	What you have and what do you need
	Willing to use creativity	Identify the real problem	What is the real need
One option	"Think" the option could work and limited time to decide	Understand more about the downside	1-Hour Pre-Mortem Assessment
	"Think" the option could work and face high impact of making an un-W.I.S.E. Choice	Fully understand the downside	Deep-Dive Pre-Mortem
	Limited support for the option	Know do we have to make this choice?	Do Nothing assessment
Two options	"Think" either option could work and limited time to decide	Have more comparison of their downsides	Compare the Pre-Mortems of two options
	"Think" either option could work and face high impact of making an un-W.I.S.E. Choice	Have higher confidence in the downside assessment	Deep-Dive Pre-Mortem
	Support for both options but not fighting each other	Create agreement on a way forward	Explore hybrid option
	A true dilemma—the options are mutually exclusive	Agree on one option as the W.I.S.E. Choice even though it won't be perfect	Structured debate for true dilemma

When you have this starting point...	And you have this situation...	But you need to...	Go here:
Three or more options	No clear W.I.S.E. Choice and an "invisible" evaluation	See how to evaluate the options objectively	Identify the evaluation characteristics
	No clear W.I.S.E. Choice and ambiguity about the decision's purpose	Understand the decision's purpose to know why to make a choice	Clarify the decision purpose
	No clear W.I.S.E. Choice and lots of ambiguity OR A working decision statement for a semi-routine or non-routine decision	A clear W.I.S.E. Choice	Full use of deliberate decision-making

1-Hour Pre-Mortem Assessment of One Option Meeting

Required input for the decision-making meeting	We think this one option could work but don't know all the downside and must spend more time to understand them.
Expected output	<p>We completely understand the risks of this single option and can manage them.</p> <p>OR</p> <p>We need to revisit the decision.</p>
Things to consider	<p>Assemble people who will have objectivity and candor to point out weaknesses and vulnerabilities of the selected option.</p> <p>Invite people who will feel affected by the choice. This might include the implementors, internal and external suppliers, users, downstream internal and external customers, and maintainers. More diversity creates better thinking.</p> <p>This type of meeting has many unknowns about how long discussions will take. Be prepared to flex the agenda as needed. I have noted some places where this could occur.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Share any available analysis for the option, including any required or implied assumptions. These can generate ideas for how the choice might fail.</p> <p>Share the Pre-Mortem process and encourage people to write their answers to these questions related to choosing the one option.</p> <p>The general format has three basic steps:</p> <ol style="list-style-type: none"> 1. Set the stage: This choice failed. 2. What happened? 3. What could we do about it?

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Review participants' concerns about assumptions or faults with the analysis (Input only, no assessment! The group will do this later.)	All with meeting leader or facilitator capturing input for all to see.	5-10 minutes	Depending on the group's capability, you might get some of this before the meeting.
Review (or create) the list of answers to the "What happened?" question	All with meeting leader or facilitator capturing input for all to see	5-10 minutes	If the discussion lasts longer than 10 minutes, then this may indicate the need for an additional work session. If the group has not done the pre-work, then this topic may take longer to complete.
Assess the potential failure events by considering the probability of the failure's occurrence and severity of impact if it occurs.	All with meeting leader or facilitator capturing input for all to see.	5-10 minutes	<p>If no failure points have a high likelihood or high impact, then the option may not need further discussion. Document the results and move to action items to discuss what happens next.</p> <p>On the other hand, this discussion may create enormous concern about the likelihood of failure occurring and the level of impact. This may cause a reevaluation of whether the choice still 'works.' When this is the case, you can either restart the search for options or continue with a more rigorous evaluation.</p> <p>If the meeting has lasted 35 minutes or longer, then you might consider agenda</p>

Topic	Who	Timing	Comments
			adjustments with the group's input. Options include: <ul style="list-style-type: none"> • Wrapping up the meeting early after discussing action items and conducting the meeting Plus/Delta activity. • Continuing to next activity knowing it will need additional time in a future meeting.
Assess the answers to the "What could we do about it or them?" question. Consider the practicality of including them as part of choosing the option.	All with meeting leader or facilitator capturing input for all to see.	15-30 minutes depending on previous timing	With a large group, consider breaking the group into sub-groups of 3-4 people. Make sure that each group makes their thinking visible.
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly. If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Do Nothing Assessment as an Option

Required input:	The current single option does not have strong support for being the W.I.S.E. Choice.
Expected output	<p>The Do-Nothing Option is a W.I.S.E. choice. We completely understand the risks and can manage them.</p> <p>OR</p> <p>We need to think differently about this decision.</p>
Things to consider	<p>Assemble people who will have objectivity and candor to point out weaknesses and vulnerabilities.</p> <p>Invite people who will feel affected by the choice of doing nothing. This might include the implementors, internal and external suppliers, users, downstream internal and external customers, and maintainers. More diversity creates better thinking.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Meeting participants should have some understanding of what Doing Nothing means and the willingness to consider this as an option.</p> <p>Before the meeting, participants should write their answers to these questions:</p> <ul style="list-style-type: none"> • What is the downside of taking no action? • What do we have to do to address this? • What does it 'cost'?

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Review (or create) the list of answers to the "What is the downside of taking no action?" question.	All with meeting leader or facilitator capturing input for all to see.	5-10 minutes	With a large group, consider breaking the group into sub-groups of 3-4 people. Make sure that each group makes their thinking visible. If the group has not done the pre-work, then this topic may take longer to complete. If the group does not identify much downside to doing nothing, i.e., not choosing, this may indicate no need to decide exists. Move to Action Items on the agenda.
Review (or create) the list of answers to the "What is the downside of taking no action?" question.	All with meeting leader or facilitator capturing input for all to see.	5-10 minutes	
Review (or create) the list of answers to the "What does it 'cost'?" question.	All with meeting leader or facilitator capturing input for all to see.	5-10 minutes	
Discuss how the effort and cost of doing nothing compares to making the choice	All with meeting leader or facilitator capturing input for all to see.	15 minutes	
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly. If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.

Topic	Who	Timing	Comments
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Compare the Pre-Mortems of Two Options

Required input:	Don't know enough about the downside of either option. We want more downside assessment for both options.
Expected output	<p>This is a W.I.S.E. Choice.</p> <p>OR</p> <p>This might be a W.I.S.E. Choice.</p> <p>OR</p> <p>We need to reconsider the decision.</p>
Things to consider	<p>Assemble people who will have objectivity and candor to point out weaknesses and vulnerabilities of the selected option.</p> <p>Invite people who will feel affected by the choice. This might include the implementors, internal and external suppliers, users, downstream internal and external customers, and maintainers. More diversity creates better thinking.</p> <p>Strive for specificity in the actions that either prevent or enable recovery from the downside. Things to ask:</p> <ul style="list-style-type: none"> • Who takes the action? • How do they do it? • What resources do they need? • How long does it take? <p>The answer will help you assess the cost and time for these actions. The time of internal resources does not come for 'free.' Time spent on this activity takes time away from other work.</p> <p>This type of meeting has many unknowns about how long discussions will take. Be prepared to flex the agenda as needed. I have noted some places where this could occur.</p>

	<p>This section has two sample agendas depending on whether you have enough people to form two sub-groups to work on one assigned option. I have also assumed that the full group or sub-groups will complete their assigned work <u>before</u> the meeting. If they can't do this, then you will need to conduct two meetings: One to do the pre-mortem and one to do the comparison.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>If you can assign people to different teams to focus on one option, then they only have to answer the Pre-Mortem questions for one option.</p> <p>Share the Pre-Mortem process and encourage people to write their answers to these questions related to either their assigned option of both options.</p> <p>The general format has three basic steps:</p> <ol style="list-style-type: none">1. Set the stage: This choice failed.2. What happened?3. What could we do about it?

Sample Agenda for sub-groups assigned to assess one option (Preferred Approach)

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Have each group present their list of failure points for their assigned option and potential preventive or mitigating actions	Each sub-group as a team or with a designated spokesperson.	10-20 minutes (about 5-10 minutes for each)	Ideally, this would be some type of presentation supported with hard copy to facilitate. The sub-groups can consider presenting only the failure points that had medium to high likelihood medium to high impact.
At the conclusion of both presentations, when looking at the overall sets of information, the full group should consider: Does one option look better than the other, e.g., less failure points, less likelihood of failure, less impact of failure and practical preventive and recovery actions.	Input from all with meeting leader or facilitator capturing 'conclusions.'	5 minutes	If yes, then this may lead to a W.I.S.E. Choice, proceed to action items.
If both options look equal, then the group should compare the practicality of the actions needed to address each option's downside.	Input from all with meeting leader or facilitator capturing 'conclusions.'	10minutes	When the discussion concludes, if the options still look equal, suggest the coin toss decision making approach. This may create a preference, or they will accept either choice.
Assess whether one of the two options is a W.I.S.E. Choice.	All with meeting leader or facilitator capturing input for all to see.	5 minutes	If no W.I.S.E. Choice emerges, the group needs to assess whether more assessment time would help or if the decision purpose needs more discussion.

Topic	Who	Timing	Comments
Review and Document the Action Items to identify who does what by when.	All with meeting leader or facilitator capturing input for all to see.	5 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
<p>Review the list of failure points for each option. When looking at the overall sets of information, the group should consider:</p> <p>Does one option look better than the other, e.g., less failure points, less likelihood of failure, less impact from failure and practical preventive and recovery actions.</p>			
If both options look equal, then the group should compare the practicality of the actions needed to address each option's downside.	Input from all with meeting leader or facilitator capturing 'conclusions.'	10minutes	When the discussion concludes, if the options still look equal, suggest the coin toss decision making approach. This may create a preference, or they will accept either choice.
Assess whether one of the two options is a W.I.S.E. Choice.	All with meeting leader or facilitator capturing input for all to see.	5 minutes	

Topic	Who	Timing	Comments
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Assess Potential for Hybrid Option

Required input:	Two options with some people supporting option 1 and others supporting option 2. Despite showing a preference they have an open mind to considering the merits of the other option. They understand their choice has a downside. If this is not the case, then move to the Structured Debate agenda.
Expected output	Determination that a hybrid option of the 'middle ground' between the two options exists. OR The decision is a true dilemma a requires additional debate.
Things to consider	In this situation, people often advocate for the positives of their option and use the risks of the one they are against to justify their choice. They (conveniently) ignore the risks of their choice and any positives of the other option. Help them see the limitations to this approach.
Pre-Work	Share the Agenda and Ground Rules. This meeting does not have any pre-work. This meeting will work fairly quickly.

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Provide an example of how a hybrid of two opposite options can sometimes result in a better result.	Meeting leader or facilitator.	5 minutes (max)	For example, breeding a poodle with a Labrador Retriever creates a dog that does not shed. Yes, it requires grooming. Remind the group that no option will ever have zero downside. If you have another example, use it.
Create a rough decision statement for the two options.	All led by the meeting leader or facilitator.	5-10 minutes	A general format is:

Topic	Who	Timing	Comments
			<p>Select way to [desired result of either of the two options].</p> <p>It does not matter which option you use. One option will always perform badly. You want to create room for a hybrid option that might work to exist for this decision.</p>
Determine whether hybrid option could work.	All led by the meeting leader or facilitator.	5-10 minutes	This activity will either show that a hybrid option will work or prove the decision is a true dilemma. Note: If the group agrees that the hybrid option could work, they still need to assess the downside before declaring it a W.I.S.E. Choice. This might require an additional session.
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Identify the evaluation characteristics

Required input:	Three or more options with no clear W.I.S.E. Choice and no visible evaluation matrix to assess.
Expected output	<p>A clear W.I.S.E. choice emerges. Use the documentation from the session as the rationale.</p> <p>OR</p> <p>The decision has high complexity and needs another session to conduct more rigorous assessment.</p>
Things to consider	<p>Often, the evaluation information lives in people's heads. This means getting people together and documenting their thinking. We must uncover the informal characteristics and convert them into <u>meaningful</u> (and measurable) characteristics. Even with limited time, usually the key characteristics emerge. We can evaluate the options against these characteristics to see how they compare.</p> <p>Sometimes team members have <i>their</i> personal matrix. If this happens, then we must compare, contrast, and critique each version to assemble a unified matrix. This may take longer than one hour, depending on the complexity of the decision.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Provide definitions for Must-have and Want-to-have characteristics.</p> <p>Must-have criteria have these characteristics:</p> <ul style="list-style-type: none"> • agreement that success depends on having or meeting the characteristic (non-negotiable, often imposed by external entities) • a quantifiable measurement (no value judgment required), , and • a feasible threshold to have (options exist that meet the required performance level). <p>When we get a yes or no answer for a Must-have characteristic, then we have a valid Must-have. For example, "Cost less than \$400" qualifies as a Must-have. No 'Maybe' answer exists.</p> <p>Want-to-have characteristics outline IMPORTANT attributes for the options to be effective. They typically maximize success or minimize downside. We often want the lowest cost, highest quality, and quickest result. When options meet the "Cost less than \$400" Must-have, then an option that costs \$350</p>

performs better than \$395. Want-to-have characteristics should allow us to compare performance levels for all options with limited subjective interpretation. We often need to create meaningful measures for Want-to-have characteristics. Chapter 6's bonus material provides additional guidance on this topic.

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Review (or create) evaluation characteristics. What are the Must-have characteristics? What are the Want-to-have characteristics?	Input from group with capture by the leader or facilitator	40 minutes (or longer)	Validate the Must-have characteristics. Look at the measures for the Want-to-have characteristics. Doing this work may take longer than a 1-Hour Meeting. If the group needs more time, then acknowledge this and make plans for an additional session.
Test if the group has consensus on the characteristics	All with capture by leader or facilitator	5 minutes	Use the Five-Finger Consensus approach to check. Note: This approach appears at the end of the document.
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Clarify the decision purpose

Required input:	Three or more options with no clear W.I.S.E. Choice and ambiguity about the purpose of the decision.
Expected output	<p>A clear decision statement and either:</p> <p>One option emerges as a possible W.I.S.E. choice because it fits within the decision statement's type of options to consider. Note: This can happen, but more frequently, the options need additional assessment.</p> <p>OR</p> <p>We have a working decision statement that enables the right type of options to be considered. We need a 1-Day workshop to conduct a valid assessment to reach a W.I.S.E. choice.</p>
Things to consider	<p>When no options seem right, this usually means the decision does not have a clear or correct purpose. This means understanding what started the need-to or want-to making a choice. We do this by identifying the implied decision statement. Making the decision statement visible helps us check if we looked at the right type of options. For example, select a four-door car differs from select a four-door vehicle. In the second case, vehicle can include pickup trucks and SUVs along with more typical cars. The words used in the decision statement change the type and number of options we can consider. Spending time on this helps create agreement on the decision's purpose.</p> <p>This sounds simple, but often requires extensive discussion.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Provide guidance on the format of a decision statement. A useful decision statement has three components:</p> <ol style="list-style-type: none"> 1. A verb like choose, select, pick. 2. A result or object like a drying method or car. 3. One or two modifiers to specify the result or object like <i>mechanical</i> drying process or a <i>four-door</i> car. <p>Putting all three together looks like the following examples:</p> <ul style="list-style-type: none"> • Choose a mechanical drying process.

- Select a four-door car.

Participants should create their version of the decision statement and bring to the session.

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Silent review of the decision statements by participants. (They will post their questions and comments.)	All with leader or facilitator keeping time	10 minutes	I recommend having each person write up their decision statement on a flip chart (or equivalent) for this review. People can jot down their questions, comments, and reactions on post-it notes. I recommend having three different color post-in notes, one for statements, one for comments and one for questions. This will facilitate the discussion
Address and discuss the Post-it note comments as necessary	Leader or facilitator guides this with capture as needed	10-15 minutes	
Use the prior discussion to create a trial decision statement	Leader or facilitator guides this with capture as needed	5-10 minutes	Playing around with words can help with this. If the group moves through this faster, this allows more time for the planning step.
Ratify the decision statement using Five-Finger Consensus Note: This approach appears at the end of the document.	Leader or facilitator	5 minutes	If ratification does not occur, this may mean the group needs more discussion of the decision purpose.
Plan how to continue the deliberate decision-making process	Leader or facilitator guides this with capture as needed	5 minutes	Depending on the timing for other topics, this time may be longer or shorter.

Topic	Who	Timing	Comments
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Mindset opening (to embrace creativity)

Required input:	Need to create an option from scratch and not optimistic about doing it.
Expected output	Open to tapping creativity to generate new options.
Things to consider	<p>We evolved by using fight-or-flight thinking. We only fight when we perceive we can win. Otherwise, we run. Creativity requires embracing the unknown. Edward de Bono created a framework for thinking using colored hats as his metaphor. Yellow Hat thinking represented thinking optimistically, while Black Hat thinking meant having pessimism. The step to look for the downside uses Black Hat thinking. For creativity, we need our Yellow Hats. This starts with thinking about possibility.</p> <p>Keep the session light-hearted and fun. Research shows that having a playful approach helps creativity. This may require changing the Ground Rules.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Have each person prepare to share their favorite funny story, joke, or graphic.</p>

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Have each person share their funny story, joke, or graphic.	Everyone takes a turn	10 minutes (max)	This sets the tone. Each person's time should be short. The goal is to get some laughter. An alternative is to have people share their favorite moments from a comedy TV show or movie.
Read the Good news/Bad news story and the salesperson joke from the <i>W.I.S.E. Choices at Work</i> book for the group.	Leader or facilitator	5 minutes	
Have the participants write their thoughts in these two areas.	All with time keeping	5 minutes	

Topic	Who	Timing	Comments
<ol style="list-style-type: none"> 1. How would the farmer react to the need we currently face? Why? 2. What is the GREAT news about this negative situation? 			
Group shares and discusses their thoughts	All with capture as appropriate	15 minutes	You can split the group into sub-groups to create more engagement and likely generate more ideas
Ask the 5-Minute Question: How did we exceed all expectations? Allow time for individual work and then a group share.	All with capture as appropriate	10 minutes (5 minutes individual and 5 minutes in group)	When people look at the problem by searching for the upside, their creativity starts. Strive to have even a few minutes for people to tap into applying their creativity to the challenge.
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Clarify starting point: What do you have and what do you need?

Required input:	Willing to use creativity and clear about the need but need clarity on how to start.
Expected output	You have some ideas and need to keep working.
Things to consider	<p>You need to find a useful starting point. This session will require lots of brainstorming, which may begin with brain writing. Brain writing means participants write their ideas on post-in notes to share with others. This encourages participation from even the quiet people.</p> <p>We often hear the phrase, "<i>When life gives you lemons, make lemonade.</i>" This sounds great except for one thing: unless life also gives you ice, sugar, and water, you can only make lemon <u>juice</u>, possibly useful, but not lemonade. Assuming you want lemonade, lemons provide only part of the Must-haves to make lemonade. You HAVE lemons, you NEED ice, sugar, and water. Identifying the resources, you have versus ones you must create or acquire helps the group get started.</p> <p>Keep the session light-hearted and fun. Research shows that having a playful approach helps creativity. This may require changing the Ground Rules.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Clarify the challenge: We need to generate options for the already agreed to need.</p> <p>Have each person prepare to share their favorite funny story, joke, or graphic.</p>

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Have each person share their funny story, joke, or graphic.	Everyone takes a turn	10 minutes (max)	This sets the tone. Each person's time should be short. The goal is to get some laughter. An alternative is to have people share their favorite moments from a comedy TV show or movie.

Topic	Who	Timing	Comments
Review and ratify the need using Five-Finger Consensus Note: This approach appears at the end of the document.	Leader or facilitator	5 minutes	
Have the group use post-it notes to capture ideas on what the group already has and what it needs	All	10 minutes	Label one area for HAVE and one for NEED
Silent review of the HAVE and NEED information. They will post their questions and comments.	All with leader or facilitator keeping time	10 minutes	
Address and discuss the Post-it note comments as necessary	Leader or facilitator guides this with capture as needed	10minutes	
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Clarify Starting Point: What is the real problem?

Required input:	Willing to use creativity, but unclear about the real need to create options.
Expected output	You have a clear starting point for creating solution ideas.
Things to consider	This session requires open discussion to gain clarity. This might require the most flexibility to adjust the approach to reach the goal. My sample agenda provides one way to approach this. You may need to or want to use different tools and approaches.
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Clarify the challenge: We need to surface the real purpose of this “decision.” Creating a potential decision statement provides one way to accomplish this.</p> <p>Provide guidance on the format of a decision statement. A useful decision statement has three components:</p> <ol style="list-style-type: none"> 1. A verb like choose, select, pick. 2. A result or object like a drying method or car. 3. One or two modifiers to specify the result or object like <i>mechanical</i> drying process or a <i>four-door</i> car. <p>Putting all three together looks like the following examples:</p> <ul style="list-style-type: none"> • Choose a mechanical drying process. • Select a four-door car. <p>Participants should create their version of the decision statement that created the need to generate new options to bring to the session.</p>

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Silent review of the decision statements by participants. They will post their questions and comments.	All with leader or facilitator keeping time	10 minutes	I recommend having each person write up their decision statement on a flip chart (or equivalent) for this review. People can jot down their questions, comments, and reactions on post-it notes. I recommend having three different color post-in notes, one for statements, one for comments and one for questions. This will facilitate the discussion
Address and discuss the post-it note comments as necessary	Leader or facilitator guides this with capture as needed	10-15 minutes	
Use the prior discussion to create a trial decision statement	Leader or facilitator guides this with capture as needed	5-10 minutes	Questioning each word can help test the thinking. For example, select a four-door <u>car</u> differs from select a four-door <u>vehicle</u> . In the second case, vehicle can include pickup trucks and SUVs along with more typical cars. The words used in the decision statement change the type and number of options Do can consider. Spending time on this "word testing" helps create agreement on the decision's purpose.
Ratify the decision statement using Five-Finger Consensus Note: This approach appears at the end of the document.	Leader or facilitator	5 minutes	If ratification does not occur, this may mean the group needs more discussion of the decision purpose.

Topic	Who	Timing	Comments
Ratify the decision statement	Leader or facilitator	5 minutes	If ratification does not occur, this may mean the group needs more discussion of the decision purpose.
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Deep-Dive Pre-Mortem for One or Two Options

Required input:	The output of a 1-Hour Pre-Mortem Meeting. You can use this agenda to assess the downside of one or two options.
Expected output	<p>The group converges on one option being a W.I.S.E. choice, including a complete plan with preventive and recovery actions.</p> <p>OR</p> <p>The option(s) won't work. We need to broaden our thinking about the decision.</p>
Things to consider	<p>Assemble people who will have objectivity and candor to point out weaknesses and vulnerabilities of the selected option.</p> <p>Invite people who will feel impacted by the choice. This might include the implementors, internal and external suppliers, users, downstream internal and external customers, and maintainers. More diversity creates better thinking.</p> <p>This agenda requires lots of flexibility in timing. You will need to use your judgement. I have allocated rough times for many topics.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <p>Provide background, including the output of 1-Hour session for review as part of the pre-work helps. To help their review, have the participants consider:</p> <ul style="list-style-type: none"> • What ideas and actions would they keep? • What actions would they modify? Why? • What ideas and actions need to be added?

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Discuss what is not accurate and what to do about it	All led by the meeting leader or facilitator.	30 minutes	These times would increase if evaluating two options.
Discuss what is missing, how much it matters and what to do about it	All led by the meeting leader or facilitator.	30 minutes	
Discuss the comments, revisions and additions the 1-Hour Meeting documentation requires	All led by the meeting leader or facilitator.	Start with one hour	Depending on the discussion, this may require additional pre-mortem assessment
Discuss assumptions that might not be true and how to either validate or continue monitoring	All led by the meeting leader or facilitator.	30 minutes	
Consolidate all the information	Group or sub-groups	15 minutes	If doing two options, create sub-groups to conduct the consolidation.
<p>If assessing one option, test if the choice can be a W.I.S.E. Choice. The group should consider:</p> <p>Does this option look possible, i.e., has acceptable failure points, low likelihood of failure, low impact from failure and practical preventive and recovery actions.</p> <p>If assessing two options,</p> <p>Does one option look better than the other, e.g., less failure points, less likelihood of failure, less impact from</p>	All led by the meeting leader or facilitator.	<p>10-15 minutes for one option</p> <p>15-30 minutes for two options</p>	<p>If one option emerges, then you can either continue discussing what it will take to implement the decision.</p> <p>If both options look equal, then the group should compare the practicality of the actions needed to address each option's downside.</p> <p>When the discussion concludes, if the options still look equal, suggest the coin toss decision making approach. This may create a preference, or they will accept either choice.</p>

Topic	Who	Timing	Comments
failure and practical preventive and recovery actions.			
Additional discussion about implementation	All with meeting leader or facilitator capturing input for all to see.	Negotiable	
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	Up to 15 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Structured debate for true dilemma

Required input:	Two mutually exclusive options have divided the group with each side supporting their preferred option. No hybrid option exists.
Expected output	The group converges on one option being a W.I.S.E. choice. OR The group realizes neither option will work and explores other ways to address the decision.
Things to consider	When no hybrid option emerges and the two sides remain entrenched in supporting their preferred option, then conducting a more structured debate may help unblock things. More debate sounds like a recipe for disaster. The key to making a debate work means adhering to the debate process <i>AND</i> having people switch sides. This approach means people who want Option 1 will advocate for Option 2 and vice versa. This forces them to see the advantages of the other side. They also must concede their preferred option is not perfect by arguing against it. You do need to know who has aligned with which option so that you assign people appropriately. This agenda allows flexibility in timing. You will need to use your judgement. I have allocated rough times for many topics.
Pre-Work	Share the Agenda and Ground Rules. Share the supporting documents for both options. Let them know they will debate 'against' their preferred option in the meeting.

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Defining consensus for the group	All led by the meeting leader or facilitator.	15 minutes	In general, Consensus does not have to mean unanimity. Sometimes, people will support an option if they feel someone has fairly evaluated the merits of their preferred option. The group should identify if a simple majority will work or they need a higher number.
Preparation for the debate	Time keeping by leader or facilitator.	Up to 1 Hour	
Each team gets three minutes to present their pro arguments while the other side <u>listens</u> .	Time keeping by leader or facilitator.	10 minutes This allows time to set up	The pro argument typically highlights the advantages of the option. The listeners should hear how the presenting team handles the downside and what assumptions they used.
Preparation of rebuttal	Time keeping by leader or facilitator.	30 minutes	Feel free to extend as needed.
Each team gets three minutes to present rebuttal while the other side <u>listens</u> .	Time keeping by leader or facilitator.	10 minutes This allows time to set up	
Allow clarification questions and discussion if necessary.	Time keeping by leader or facilitator.	15 minutes for each side	Feel free to extend as needed.
Hold an anonymous vote on the two options to see whether a consensus emerges	Leader or facilitator.	10 minutes	When you tally the votes, you may not reach 100% agreement, but it may

Topic	Who	Timing	Comments
			<p>create enough consensus to make a choice.</p> <p>If consensus emerges, move to Action Items.</p> <p>If consensus does not emerge, the group will need to discuss how to proceed. Options include evaluating the "Do Nothing" option or reframing the decision.</p>
Discussion of alternative paths	All led by the meeting leader or facilitator.		
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	5 minutes	<p>Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly.</p> <p>If the group makes a W.I.S.E. Choice, then have an action item to document the rationale.</p>
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous improvement and maintaining what works.

Full use of deliberate decision-making process

Required input:	<p>The decision has high complexity and needs a more rigorous assessment.</p> <p>We have a working decision statement that enables the right type of options to be considered.</p>
Expected output	<p>A W.I.S.E. Choice.</p> <p>OR</p> <p>A plan to make a W.I.S.E. Choice.</p>
Things to consider	<p>The time for this activity might occur in one day, but if the participants need to collect or verify information, it may occur in two or more sessions. The more non-routine the decision, i.e., high impact and uncertainty of performance information, the more likely the decision will take more time.</p>
Pre-Work	<p>Share the Agenda and Ground Rules.</p> <ul style="list-style-type: none"> • Provide background and context for the decision. • Provide guidance on the decision statement framework. (Choice verb, outcome or result with one or two modifiers). • Issue the working decision statement for critique. If one does not exist, then ask participants to bring their ideas for the statement. • Explain Must-have and Want-to-have evaluation characteristics. Ask participants to bring their ideas for both types to the session. • If the team has not already identified options, ask participants to bring their ideas for options to consider. This should include relevant performance information, e.g., cost, dimensions, output, required inputs, etc. • Share the Pre-Mortem process and encourage people to think about their answers to these questions related the options under consideration. <p>The general format has three basic steps:</p> <ol style="list-style-type: none"> 1. Set the stage: This choice failed. 2. What happened? 3. What could we do about it?

Sample Agenda

Topic	Who	Timing	Comments
Ratify the Agenda and Ground Rules	All led by the meeting leader or facilitator.	5 minutes	If the group works on decisions frequently, then this activity will take less time. But do not skip even a fast review to remind people of 'the rules.'
Ratify the decision statement	All led by the meeting leader or facilitator.	15-60 minutes	Validate the decision purpose. Create or refine the decision statement. This may require time for discussion to reach agreement.
Develop evaluation characteristics	All led by the meeting leader or facilitator.	30-60 minutes	I recommend using Brainwriting to start and then allow the group to discuss.
Identify Must-have characteristics	All led by the meeting leader or facilitator	15 minutes	Make sure each Must-have is non-negotiable, has a clear Yes/No measure, and a is possible.
Clarify Want-to-have characteristics	All led by the meeting leader or facilitator	30-60 minutes	This may take time to clarify and identify useful measures especially for the more qualitative characteristics. With a longer list consider dividing the group into sub-groups. If this happens, allow time for discussion of each group's output. Determine if the decision will benefit from using weighting of the objectives.
Create an evaluation matrix.	All led by the meeting leader or facilitator.	15 minutes max	This should be straightforward. If the group quickly sees the evaluation matrix as looking 'right,' you know the decision process has the right approach. Depending on the meeting length, this could provide a time for a break. This also allows people time to reflect on the evaluation characteristics and gather performance data for the options.

Topic	Who	Timing	Comments
Assemble list possible options assess data availability	All led by the meeting leader or facilitator.	15 minutes max	Depending on the options, it may require time to assemble appropriate performance information. This may require an action plan and therefore, a break in the meeting.
Use performance data for Must-have criteria to eliminate options.	All led by the meeting leader or facilitator.	30 minutes	This activity <u>must use data</u> that all agree to. People may get upset when their favorite alternative does not pass. Remind people that this means the option did not meet the minimum criteria for success.
For remaining options, assemble performance data related to the Want-to-have characteristics. After comparing performance, then develop scores.	All led by the meeting leader or facilitator.	60 minutes	If the group does not have performance data, then you might need to schedule time for a second meeting.
Identify options worth considering for risk assessment.	All led by the meeting leader or facilitator.	15 minutes	This may provide a chance for taking a break or even scheduling another meeting.
Conduct the Pre-Mortem assessment for at least the top two performers.	All led by the meeting leader or facilitator.	60 minutes plus	The evaluation matrix only identifies <i>potential</i> W.I.S.E. choices, but we MUST examine the downside that comes with the upside that the matrix quantified. Consider using sub-groups.
Make the W.I.S.E. choice and document the rationale.	All led by the meeting leader or facilitator.	15-30 minutes	
Review and Document the Action Items to identify who does what by when	All with meeting leader or facilitator capturing input for all to see.	15 minutes	Provided you or the notetaker have been documenting throughout the meeting, then this will go quickly. Typically, these actions relate to implement the W.I.S.E. Choice.
Plus/Delta for the meeting to capture what worked and what they would change	All with meeting leader or facilitator capturing input for all to see.	5 minutes	Don't skip this step because it provides an opportunity for continuous

Topic	Who	Timing	Comments
			improvement and maintaining what works.

Suggested Ground Rules

The list below outlines suggested ground rules.

- Have an agenda for all meetings. No agenda, no meeting.
- Understand that NO choice is perfect, and every option has a downside.
- Be open-minded.
- Avoid defensiveness.
- We will use a consistent and active approach to gauge consensus level. See Five-Finger Consensus Check below as our way to accomplish this.
- Address technical conflict with appropriate people focusing on the issue, not the people. We will use Five-Finger Consensus. (See method below.)
- Address interpersonal conflict privately. No triangulation. Work with the person directly.
- Use a Parking Lot for off-topic issues. Review the Parking Lot regularly.
- Avoid truth by repetition. If you feel we have not captured your thought, ask to place it in the Parking Lot.
- Document agreements. Including pros and cons as appropriate.
- Capture action items with who, what, and when. Review before concluding the meeting.
- All meetings will end with a Plus/Delta Assessment—what worked and what can be improved.

The Five-Finger Consensus approach allows a quick assessment to gauge consensus level.

The process has one step. Everyone provides their support level using the following finger number scale:

- 5 fingers mean total support. (No further discussion needed.)
- 4 fingers mean support with some minor reservations we don't need to discuss now. (Be sure to capture the concern to work on at the right future time.)
- 3 fingers mean I am ambivalent and see both sides. Will go with the group's choice.
- 2 fingers mean I object and want to discuss now.
- 1 finger (index!) means stop; I am against this decision.

NOTE: One or two fingers require discussion and reassessment!

*Additional and very important note: People who are ambivalent as a 'three' must Live with the Decision. They do not get to discuss their ambivalence.