

Real-Life Case Worksheet

Instructions

Analysis

During the workshop, you will practice working through a real-life situation and develop a plan for an interaction you would like to have with someone at work.

The situation may be one that poses a threat or addresses a problem. However, it doesn't have to be a negative circumstance at all. It can be any important one-to-one discussion. For instance, it might be about a new plan you want to put forward, getting involvement on a project, developing a way to share information, dealing with a teamwork issue, conducting a coaching session or a performance review.

The other person could be anyone you want to interact with. Perhaps, you are contemplating a sensitive conversation with a direct report, participating in a coaching session with your manager, seeking support from a peer, working through a delivery problem with a customer, or addressing a quality concern with a supplier. Whatever you choose as your Real-Life Case, it should be about an actual situation, and the interaction you want to have should be important to you.

Since a significant portion of the workshop is devoted to Real-Life Cases, you'll have the opportunity to apply what you learn in the workshop right away when you return to work. You'll discuss, practice, and get useful feedback on ways to approach this important situation.

Procedure

1. Identify your Real-Life Case.
Choose an important interaction you'll be involved with in the next 30 days. The situation does not have to be a problem — just an important discussion you want to have with anyone with whom you interact as you go about your job.
2. Complete the **Real-Life Case Worksheet** on the next page.
3. Bring a copy of the worksheet with you to the workshop.

Real-Life Case Worksheet

Please bring a copy of the completed form with you to the workshop.

Your Name _____

Situation Description

Other Person

Name and title _____

Relationship to you (direct report, peer, or manager) _____

Situation

Give a general description of the situation.

Behavioral Factors

Other Person's Behavior

Distribute 10 points among the following four descriptions to describe the other person's behavior in interactions with you. Any distribution of points is acceptable, but the total must be 10.

Other Person's Behavior	Points
Q1 — Direct, brash, argumentative, stubborn, forceful	
Q2 — Aloof, cautious, silent, indifferent, uninvolved	
Q3 — Overly friendly, social, appeasing, agreeable, meandering	
Q4 — Candid, inquiring, analytical, collaborative, task-oriented	
Total	10

How does the other person's behavior contribute to the situation?

My Behavior With This Person

Distribute 10 points among the following four descriptions to describe your behavior in interactions with the other person. Any distribution of points is acceptable, but the total must be 10.

My Behavior	Points
Q1 — Direct, brash, argumentative, stubborn, forceful	
Q2 — Aloof, cautious, silent, indifferent, uninvolved	
Q3 — Overly friendly, social, appeasing, agreeable, meandering	
Q4 — Candid, inquiring, analytical, collaborative, task-oriented	
Total	10

How does my behavior contribute to the situation?

Purpose of Interaction

What is the purpose for having the interaction?

Benefits/Consequences

Benefits/Consequences to You

What are the benefits to you if the situation is addressed?

What are the adverse consequences to you if the situation is *not* addressed?

Benefits/Consequences to the Other Person

What are the benefits to the other person if the situation is addressed?

What are the adverse consequences to the other person if the situation is *not* addressed?