Better Meetings — The POWER process

Prepare

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Open

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Work

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End

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Reflect

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The POWER Process for Statistical Collaboration Meetings:
Prepare **O**pen **W**ork **E**nd **R**eflect
(This process has been adapted with permission from the work of Dr. Doug Zahn: zahn@stat.fsu.edu)

Prepare – Mentally and physically prepare for the meeting
- Review the materials the clients sent you, specifically the initial request for help.
- Review any unfamiliar terminology or statistical methods in the request.
- Arrive at the meeting room early to be sure it is prepared for the meeting (tidy up).
- Mentally prepare yourself for the meeting (do what you need to do so you can focus on the client and his or her research/business questions).
- Have a flexible plan for the meeting.

Open – Open the meeting correctly to set up the plan for the rest of the meeting
- Introduce yourself to the client. Smile. Shake hands. Make eye contact.
- **Time conversation** – Check if the scheduled meeting time still works for everyone and whether they can stay longer if needed. Ask: "Does it still work for you to meet for (1 hour)? If we're being productive, for how long after (1 hour) could you stay?"
- **Wanted conversation** – Ask what the client wants to accomplish during this meeting.
  - Paraphrase the client's wants in your own words and ask: "Is there anything else?"
  - Summarize and prioritize a plan for the rest of the meeting from the client's wants.
- Willing – Determine if you are willing to accomplish what the client wants.
- Able – Determine if you are able to accomplish what the client wants.

Work – Learn about the project and work with the client to address their wants
- Overall Research Goals – Ask about the client's overall goals and determine the "why" of the research/business question. Why is this question important to the client/company/stakeholders?
- Seek first to understand, then to be understood. Be sure the client understands the statistical information you are sharing with them. If you are unsure about something, ask. If they can't explain the statistical methods to their bosses, they probably won't use the method.
- Stay on track and efficient with time. Be sure you are addressing the client's wants.
- Answer questions completely, with no intentional omissions. Be respectful.
- If you do not know the answer to a question, tell the client that you will look into it – do not give the client an incorrect answer or fake your understanding.

End – Summarize the meeting and outline the next steps for the project
- Leave enough time so that you can perform all the steps of End and leave on time.
- Summarize any decisions made at the meeting.
- Determine if each of the wants were satisfactorily addressed by asking the client.
- If a want was not satisfactorily addressed, devise a plan to address it.
- What will each individual be doing before the next meeting and what is the timeline?

Reflect – Determine what went well and what didn't go well during the meeting
- If a breakdown occurred, determine how and then why it occurred.
- Reflect on what you would do differently in the future.

Name: _____

Name one thing we discussed today about meetings that you think you can use to improve your consulting/collaboration skills.

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