

# SmartStart – Get Set for Success



*This is a template for you to use to create an agenda for a structured conversation that helps you get to know the person with whom you will be working. The intention is to get to know him or her as a human being, establish a positive connection and set your working relationship up for success by beginning with mutual understanding. **Please do not follow this verbatim – customize it to fit your unique situation!** SmartStart is intended to flow as a conversation. Ask questions and be prepared to share your answers as well.*

## Preparation for SmartStart:

- Define what success looks like to you, both in this interaction and in your ongoing working relationship
- Go through this outline in advance to highlight the questions and talking points that are important for you, customizing and defining your own answers where applicable
- If possible, provide a list of the questions that require some consideration so he/she can also have time to prepare thoughtful answers

## Discussion Topics & Suggested Questions

### 1 – Context

*Be prepared to share your context: “I wanted to have this conversation because...*

- *...it’s important that we are successful in our working relationship.”*
- *...the more we know and understand each other, the better results we can achieve together.”*
- *...in my experience the most powerfully productive teams are the ones who know and understand each other well. I want to jump start that process for you.”*

Explain why this conversation is important, and what you hope to accomplish through the SmartStart©

### 2 – Introductions

*Share your story and then ask about their story: you don’t have to disclose every detail about yourself personally and professionally in this meeting. However, share enough that you get to know each other as human beings.*

*The questions provided are meant to inspire you. Use a few of these or come up with your own.*

*You don’t have to ask everything at once!*

#### Personal

- Personality awareness (MBTI, DiSC, etc. what have you learned about yourself)
- Family
- Values
- Hobbies and personal interests (as appropriate)

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## Professional

- Where did you go to school?
- What was the highlight of your academic career?
- How did you pick this field?
- A pivotal point in your career...
- Organizations you volunteer with
- History with the company
- Highlights of accomplishments
- Skills and strengths that can be applied
- Career goals, hopes and dreams

## **3 – Expectation Setting**

*Answer the question, “a successful working relationship looks like...” and ask for the other person’s answer to that question. Then talk specifically about how work gets assigned and reviewed, about your working style and about how you will communicate. Do you have any work philosophies or “rules of thumb” that you can share to help the other person better understand your unique approach?*

## Role

- How we can work well together?
- How work is assigned and tasks divided?
- Which decisions I am responsible for making; what decisions you have authority to make?
- Budget authority (as appropriate)

## Communication

- My preferred method – email, voice mail, text, meetings (what is yours?)
- Urgent versus regular communication; does the method change?
- Frequency of communication
- Amount of detail you want to receive
- Regular 1:1 meetings; how often

## Working Style

- Is your preference to have ideas explained in PPT and ready for discussion or do you like free-flowing collaborative ideation sessions?

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## Status

- Do you want regular status updates?
- How do you prefer to receive this information?
- How often / what format?

## Schedule

- Any critical deadlines or meetings coming up?
- I have commitments for (training / vacation)
- I will keep my calendar up to date; I will always complete my deliverables as promised

## Validate Expectations Understanding

*This section is intended to validate mutual understanding about the tasks, activities and results that need to be accomplished. Make the time to get clear about what needs to be communicated before you talk.*

- Discuss the work that needs done
- Restate the objectives of your work or project based on your understanding
- Who is impacted by the work you are doing? Who else do you need to meet or work with to be successful?
- Challenges (the problem this work is going to solve)
- Solution Elements (how is the problem being solved)
- What's changing as a result of this work
- Who needs to know; what do they need to know
- Success Criteria / Definition – what does success look like?
- How will the work be evaluated?

