

## ***The Five Step Meeting***

The leaders who I admire most are often the last ones to speak at a meeting. The first time I noticed this was with Glenn Smiley, a person who worked side-by-side with Martin Luther King in the 1950s and 60s. Glenn was a nonviolence trainer for the civil rights movement. I spent lots of time with Glenn when he was on the national council of the Fellowship of Reconciliation, an international peace organization I worked for in Nyack, NY from 1979-83. When Glenn spoke at a meeting, he would summarize the points made before him, giving credit to others (by name) for their ideas, distinguishing what he agreed with and what he disagreed with, calling people by name throughout his presentation and drawing his conclusions from the discussion. His approach had a powerful impact on people in the room.

Glenn's practice of letting others speak first and then summarizing points of agreement and disagreement are actually a part of a course I now teach called ***Leadership Through People Skills*** (LTPS), which is part of a national training program of Psychological Associates. This part of the training is called the ***five step meeting*** process. During the weeklong LTPS class, we model, train and teach these five steps in role plays about real and practice cases. This process is designed specifically for one-on-one meetings between a leader and a follower, but it can be adapted to team settings as well.

**(1) *Introduction.*** The first step is to enter sociably into the meeting, introduce the purpose of the meeting and to test and increase the other person's receptivity to having this meeting. Note that the step has elements of the leadership task and the relationship. In order to

accomplish the task associated with the purpose of the meeting, the leader builds the relationship in such a way as to build trust in the leader and commitment to the meeting.

**(2) Listen.** The second step is to invite the other person to present their views while you listen. This is the most powerful aspect of the five step meeting process. Generally speaking, when people come to the leader with a problem, it is expected that the leader will find the solution. For twenty years, I supervised a Catholic Charities program that offered immigration services. The Latino women who worked in that office considered me the “hefe”, which is Spanish for “the boss”. It took years of participative leadership to break them of their instincts to defer to me in every situation. Ironically, when they came to me with a problem, they often had been reflecting on it for days or weeks. That put them in a much better situation to go first when they approached me with the problem. But too often, the leader feels an obligation to fix the problem and makes the mistake of going first.

The key to the second step is to listen attentively, which includes the ability to summarize what is heard. It is amazing how many problems are solved just by listening to the concerns of the other person and carefully summarizing that point of view. Listening builds the credibility of the leader and the relationship with the other person. It can also be an efficient use of time, because you get the message right the first time. It is also interesting to see how many other issues can be resolved through listening to one issue. The power of listening is counter-intuitive because we usually think of presenting as being more powerful. But *listening itself can be persuasive*, as will become clearer in the third step.

**(3) Present your views.** In step three, the leader presents his or her views. After listening carefully in the previous step, the leader has raised the receptivity of the other. If step two is

performed well, the other person will be eager to hear the leader's views. It is important at this point to identify and articulate areas of conflict or potential conflict. Modeling the style of Glenn Smiley, the leader states his or her views in terms of areas of agreement and areas of disagreement with the other person (or in a team meeting, the others in the room).

Conflict avoidance at this point can cause much more serious conflict later. Most of what the leader feeds back might not be so black and white. The leader might disagree with the overall idea being proposed but can agree with the intent of the solution, or agree that there is a problem that needs to be addressed or qualify certain areas of agreement that need to be checked before a final answer is given. Sometimes the leader needs to discuss certain ideas with someone else to clarify areas of potential problems or concerns. But generally speaking, the leader should be able to find something to agree with and something about which to express concern or disagreement.

**(4) *Resolve differences.*** In step four, the leader addresses the areas of conflict and works to resolve the differences, one at a time. This is the problem-solving step of the process. It is useful to identify how many areas of disagreement need to be resolved and the extent to which they are serious differences or potential concerns. Some of the issues will be connected and sorting through one problem might help provide some insight and gain some momentum for solving other issues as well. The entire conflict does not have to be resolved at this point, especially if other parties to the disagreement are not present. But the resolution should at least identify the next steps toward resolving the areas of disagreement.

It is important at this time to *separate the person from the problem* (Fisher & Ury). Focus on the task differences without blaming the other person. These are the disagreements you

have with the proposal or the idea itself, not the person presenting the idea. If you have relationship issues with this person, such as violated trust, they can be addressed in other ways and at other meetings (See Chapter Seven). Keep the focus on the task differences in step four of this type of meeting. Paradoxically, solving task disagreements can increase trust and repair relationships between two parties in conflict.

Sometimes the leader needs to allow the other person to do some venting in step four. This means entering the listening mode again. The other party is likely to be upset that the leader disagrees with some aspect of their proposed idea. The emotionally competent leader can identify what emotions are in the room and give the person space to work through those emotions. Reflective probes can be very useful at this point. This is where the leader reflects the emotion of the other person and states it back, such as “I can see this is very frustrating” or “You are angry about this.” If the leader has identified the correct emotion at that point, the other person is likely to say something like, “You bet I am”. Then the leader allows them to explain why. In order to vent that emotion, the leader’s role is to listen, summarizing the main points of the other person and reflecting the emotions until they are ready to return to the problem-solving mode of this step.

If the leader identifies the wrong emotion at some point, or if the other person just doesn’t want to admit it at that point, the other person is likely to say something like, “No, I’m not really angry.... I’m just frustrated.” Others might say, “I’m not angry with you, but I’m very upset with the administration” or someone else. At this point, the leader needs to keep the focus of the meeting from veering away from the original purpose. The other person’s idea is still on the table. The leader also needs to be careful not to try to resolve relationship issues with third parties at this point either. Keep directing the conversation back to the task conflict. It is useful

to keep track of the issues identified at the beginning of this step and remind the other person about the progress being made. This is another way to continue summarizing what the other person has said, which is critical throughout this step.

When the leader summarizes what the other person has said, it is important to check to make sure that the other party agrees with the summary. Listening with intent to summarize does not mean agreement but it does clarify the disagreement, which is critical to resolution.

However, sometimes our summaries can include our own views or be distorted by our own biases. This is particularly true when viewpoints representing the areas of disagreement have their own set of language, which is more common with normative conflicts (See Chapter Seven).

**(5) *Plan next steps.*** In step five, the leader solidifies the agreement and review next steps. This includes reaching a conclusion on each area of disagreement, identifying steps that will be taken next and restating the resolution so that both parties are on the same page about what has been decided. Meetings that skip this step are destined to be repeated. A day, or a week or a month later, both parties will be much more likely to have a different version of the agreement that was reached if this step is not performed confidently. It is useful to ask the other person to summarize the agreement before completing this step. Any areas of disagreement about their summary will need to be clarified and resolved.

Conclude the final step on a positive note, reminding the person of the progress that has been made, being careful not to gloss over the areas of disagreement that might still exist but expressing gratefulness for the contribution the other party is making to the team. The leader should appreciate ideas that might be innovative, controversial and perhaps contrary to the leader's viewpoints. Some of the best ideas are kept quiet because the other person is afraid to

express ideas that might be contrary to those of the leader. Schedule a time to get together and check that the agreement is working. Express appreciation for the meeting.

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