

DEBRIEFING CHECKLIST

- Create timing and expectations for formal sessions:
 - Weekly or monthly during project, and at conclusion.
 - Phone and e-mail may substitute for in-person meeting on occasion.
 - Establish durations and desired format, as well as audience.
- Plan informal debriefings when conversing with buyer or at other opportune moments.
- Content needs:
 - Objectives of project.
 - Measures of success and actual progress to date against them.
 - Current value already being derived.
 - Contemporary accomplishments and setbacks.
 - Hard evidence and observed behavior, not conjecture.
 - Documents and handouts as appropriate.
 - Steps for fine-tuning and changing protocols, if needed.
 - Any additional resource needs that have developed.
- Delivery needs:
 - Notes with any relevant handouts.
 - Visuals is needed: easel sheets, overhead slides, Power Point, and so on.
 - Privacy.
 - Anticipated questions and responses rehearsed.
 - Documentation of all material used in debriefings, even informal ones.