REMOTE DEBRIEFING

How to conduct debriefs in a virtual world

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What’s included in this pack:

1. Suggested step-by-step process for remote debriefing
2. Checklist for pre debrief/ during debrief/ post-debrief stages
3. Resources and materials you will need for yourself and the material needed for the person you are debriefing.
4. PowerPoint deck to share in the set-up phase of the debrief
5. Sample Pre-Debrief and Post Debrief email templates
6. FAQ

Remote Debriefing Process at a glance

(Process assumes LSI has been launched and reported on. Also the term 'client' is used to describe the person you are debriefing).

We understand that circumstances are different for each practitioner and their clients and while this process is our recommended ideal, not all aspects may apply equally to all situations. This is a guide please contact us if you have any additional questions.

1. Getting Ready for the debrief

- ❑ Confirm contact details of client: mobile/phone/email
- ❑ Ensure you have LSI reports
- ❑ Organise date with HS for materials to be delivered to you/ your client
  - ▪ Self Development guide
  - ▪ Profile Supplement and coloured markers (if required)
  - ▪ Profile Summary Cards
- ❑ Set yourself up with a Video conference (skype, zoom, Blue jeans or MS teams)

2. Pre-Debrief: Setting up with your client

- ❑ Ideally organize a pre-brief VC or phone call with your client to:
  - ▪ Explain purpose, process and your role
  - ▪ Answer any questions
  - ▪ Connect and build rapport, understand their context, goals and challenges
  - ▪ Confirm debrief session time
- ❑ Send email confirmation following this call/VC

3. On the day set up

- ❑ Send reminder via text to confirm they are ok to debrief at the time agreed.
- ❑ Set yourself up for optimal effectiveness
  - ▪ Quiet room, water LSI report and materials in hard copy and soft copy. Remove distractions for the next 2.5 – 3 hours
  - ▪ 1 hour before, check technology (zoom, skype, teams, blue jeans etc) to ensure it is working. Have mobile phone charged and ready with client's number in case technology or sound doesn't work well their side or yours while you are debriefing
- ❑ Have email to client ready to go with PDF LSI reports to send at appropriate time.

4. During Debrief

- ❑ Intro and frame as per usual
  - ▪ Check they have materials
  - ▪ Check wifi connection (more on technology tripwires later in this deck)
  - ▪ Check if they have any constraints for the time that you need to be aware of.
- ❑ Proceed with your debrief as you would normally
  - ▪ Send their LSI report as you discuss (send LSI 1 and then LSI 2)
  - ▪ Remember the HS LSI Debriefing Checklist as a guide – it has useful
  - ▪ More detail on this stage later in this deck

5. Post Debrief

- ❑ Immediately after session, send post debrief email (see template) including:
  - ▪ High level summary of issues discussed
  - ▪ Next steps in terms of what they might do to deepen their awareness and understanding of their LSI
  - ▪ Send post debrief questions for them to consider as prep for follow up action planning session.
  - ▪ Confirmation of day and time of follow up action planning session.

Step 1: Getting Ready

(2-4 weeks prior to debrief)

- ❑ **Confirm contact details** of client: mobile/phone/email. Set up a time for 2 sessions
  - Debriefing session (2 hours recommended)
  - Follow up Action planning session (1hr-1.5hr)
- ❑ **Work with your account manager** at HS to check project is on track and there are sufficient respondents to do debrief
- ❑ **Organise date with HS for materials** to be delivered to you/ your client
  - Self Development guide
  - Profile Supplement and coloured markers (if required)
  - Profile Summary Cards

  Note: we are in the process of converting some of our most popular and loved LSI Debriefing support materials such as the Self Development Guide into 'e-books' or on-line resources. We will update all our community when these are available. In the meantime don't forget to check the resources already available on your AP Portal.
- ❑ **Set yourself up with a Video conference**. If your organisation uses Microsoft teams this provides a great resource for video or phone chat, however if you are external to your client, you will need to set up a subscription to a VC provider such as Skype, Google hangout, Zoom or Blue Jeans for example.

Step 2: Pre-Briefing, setting up with your client

(1-2 weeks before debrief)

- ❑ Ideally organize a pre-brief VC or phone call with your client to:
  - Whether you know the person you are going to debrief or not, we highly recommend organizing a pre-debrief phone or VC call. It may be no more than 15-45 minutes depending on how familiar you are with them. The wisdom behind this is:
  - it gets you connected and ‘warmed up’ with each other ahead of the debriefing session so the rapport and comfort is more likely to be there when you begin. This step is about helping to build a sense of safety for your client.
  - You can explain the purpose of the session, understand their expectations, answer any questions
  - Explain the circumplex and LSI and how it works (this will save you a bit of time during the debrief process)
  - You can also use it to help extend your awareness and understanding of their role, challenges, opportunities, what they would like to get from the process and any development goals they have.
  - Confirm technology requirements, ask about any potential constraints on their technology which might interfere with being able to do a debrief
  - This kind of pre-brief gives you an opportunity to cover off some of what would normally be covered off as part of the “set up” in a normal face to face process. This then allows you time in the actual debrief to check in on some of these things and relate it to how the LSI can help them achieve their personal and professional goals.
- ❑ Send email confirmation following this call/VC

Pre-Briefing checklist

Here is a check list for what your pre-briefing discussion might include. Not everyone will have the opportunity to cover all these aspects. This is a guide of what can be covered in the time you have got for a pre-brief call.

15min

The Process

- What this is all about, why we are doing it, how they can benefit (check how much information they have and how willing they are)
- Explain the process, what they can expect
- Confidentiality.
- Questions they might have

15min

Their Situation and Context

- Their role & responsibilities?
- What's working well right now?
- What are some of your challenges?
- Explore both Professional and Personal.
- Aspirations – within the current role & beyond?

10min

Expectations

- What would you like to get out of this process?
- What would be an effective / valuable outcome from this for you?
- What would you like from me?

15min

Overview of the Circumplex

- Task / People
- Satisfaction / Security
- Passive Defensive – Energy & key Behaviours
- Aggressive Defensive – Energy & key Behaviours
- Constructive Styles – Energy & key Behaviours

Step 3: A few days before and on the day of the debrief

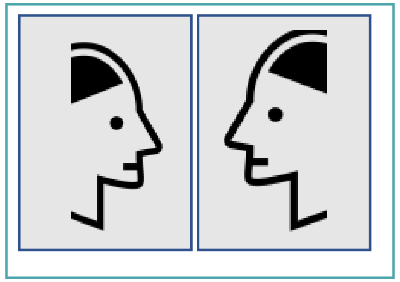
- ❑ 3-5 days before – email. Text or phone check to see your client has received the materials (We recommend Self Development Guide, 1 Page LSI, profile summary cards or a complete debriefing kit and profile supplement and Blue, Red and Green markers if you intend to get them to colour in their profile)
- ❑ On the day send reminder via text to confirm they are ok to debrief at the time agreed.
- ❑ Set yourself up for optimal effectiveness;
  - Quiet room, water LSI report and materials in hard copy and soft copy. Remove distractions for the next 2.5 – 3 hours
  - About 1 hour before, check technology (zoom, skype, teams, blue jeans etc) – ensure it is working. Have mobile phone charged and ready with the client's number in case technology or sound doesn't work well their side or yours while you are debriefing
  - Have email to client ready to go with PDF LSI reports to send at appropriate time during the debrief.

Step 4: Doing the debrief

- ❑ **Intro and frame as per usual debrief, Check the following before getting into the session proper:**
  - Check they have materials with them for your discussion
  - Check wifi connection (more on technology tripwires later in this deck)
  - Check if they have any constraints for the time that you need to be aware of.

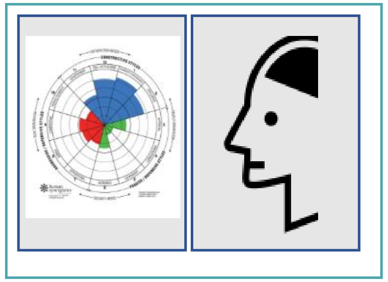
- ❑ **Proceed with your debrief as you would normally**
  - Send their LSI report as you discuss (send LSI 1 and then LSI 2)
  - See the LSI Accreditation Handbook on your AP Portal (Pp 40 - 43 and Pp 64 – 68)

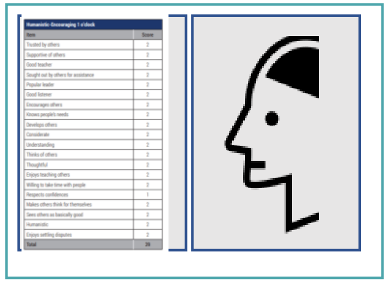
What doing the debrief might look like



1. **Introduction & frame Both on screen**

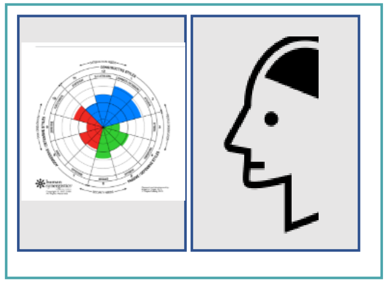
- Review Circumplex and styles
- Ask them to read LSI style descriptions (1 pager)
- Ask which styles do they relate to, what do they think we might see in LSI 1?
- Go to LS1 1 – either read the scores out to them and get them to colour in profile – Still both on screen
- Show report without colouring in
- Share your screen so you are both looking at LSI 1 Report Circumplex first.

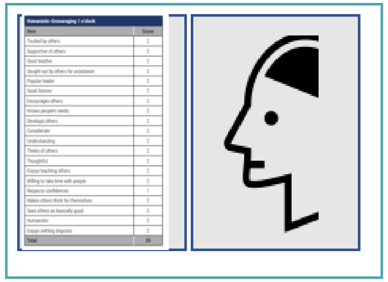




2. **Show LSI 1 item by item**

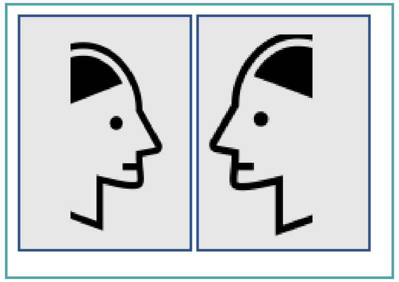
- Either as you are speaking about the LSI 1 Circumplex, send the email with their PDF LSI 1 item by item report.
- Walk through the report with the client as you would normally in a F2F
- Segue into LSI 2 – how are you feeling ? How might have your thinking shaped your behaviour ? What do you think others will have seen ?





3. **Show LSI 2 item by item**

- Either as you are speaking about the LSI 1 Circumplex, send the email with their PDF LSI 1 item by item report.
- Walk through the report with the client as you would normally in a F2F



4. **Wrapping up**

- How are they doing ?
- Where are they at – at the end of the debrief session?
- What are the appropriate actions for next time?
- What actions will generate greater Awareness?
- What is required to build momentum

Conversation funnel

Circumplex's Observations:

- Orientations Task / People – Satisfaction / Security.
- Primary Cluster Passive / Aggressive Defensive - Constructive.
- Primary & Back up styles.
- Least extended Constructive style.

Interpretations:

- What are the key messages?
- Where is the individual's time & energy deployed?
- What is helping / holding the individual back?
- What are some of the potential outcomes from the profile?
- What might be some of the consequences?
- How could the time & energy be more efficiently deployed?

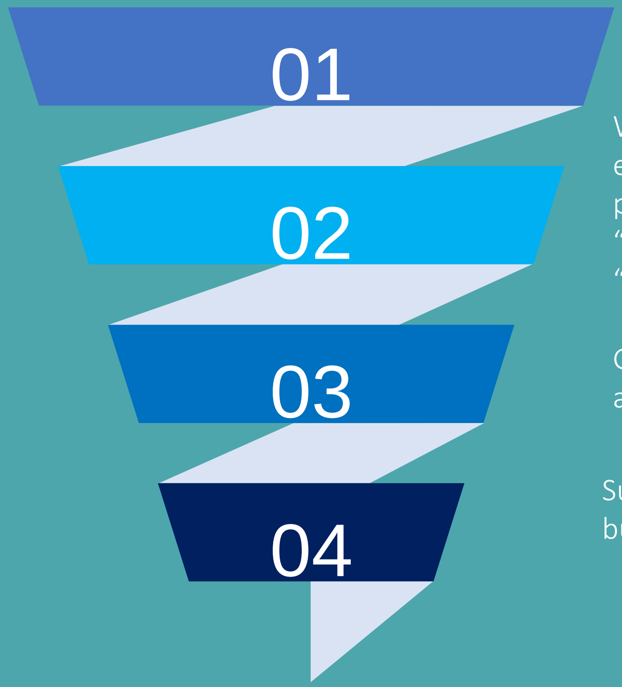
Actions:

- Where are they at – at the end of the debrief session?
- What are the appropriate actions for next time?
- What actions will generate greater Awareness?
- What is required to build momentum?

Follow up Session:

- What can they expect?
- What should they bring?
- What should they have been working on? – recap Actions in closing.
- Support between now and then

Conversation Funnel - Using the LSI Report, Data and Materials



Big picture – Circumplex
"What do you see?" "What stands out for you?".

Which styles stand out for you, which would you like to explore more ?. Get them to read descriptions in SDG or profile summary
" Can you relate to that description? Or
" How might this show up for you?"

Go to item by item for the styles most of interest to them and Primary/Secondary.

Summary perceptions and Specific insights, awareness building around specific issues that matter to them..

Step 5: Post debrief

- Immediately after session, send post debrief email (see email template) including:
  - High level summary of issues discussed
  - Next steps in terms of what they might do to deepen their awareness and understanding of their LSI
  - Send post debrief questions for them to consider as prep for follow up action planning session.
  - Confirmation of day and time of follow up action planning session.

TIPS AND TEMPLATES

THINGS TO HELP ALONG THE WAY

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Technology trip wires and what to do about them

- **Check the technology is working on the day (at least 30 mins before earlier if possible)**
- **What do I do if the video or sound doesn't work despite earlier testing?**
  - If your computer sound is not working turn it off and dial through on your phone so you will still have the full experience with better sound.
  - if your video isn't working – you could try a different device it may work on your tablet or phone, most services do.
  - If it doesn't work on any devices, you can continue on phone or computer audio. Email the client their report and get them to confirm when they have received it. Walk through the same process being mindful to check you are always both looking at the same page.
- **What if my screen keeps freezing or my sound keeps dropping out?**
  - If it happens more than 2-3 times you will need to make a call to try one of the alternative options above or reschedule if the technology (VC nor phone) is not cooperating.

What if my client has a negative/ strong reaction while they are receiving their data?

It’s always hard when someone has a strong reaction to their feedback -even when you are in the room but when you are not in the room with them, it may feel even harder, however, in reality, everything that you would do in a f2f session you do virtually:

- Pause the debrief and check if they are ok – “how are you doing?”, “what’s happening for you right now?”
- If they are very distressed it may be that you need to check if they have anyone near that you can contact or that they can draw on.
- EAP service or equivalent other mental health service – you may offer to help facilitate this
  If you remain concerned about them, ask if you can contact them later in the day to check in with them.
- Self care – take care of you post the debrief and debrief with a fellow practitioner or call us and we can support you.
- One of the important reasons to do a pre-brief call is that it may help to highlight any potential issues and give you a chance to speak about their life, challenges – at this point you may ask if you are concerned, ‘Is this the best time to do this? Shall we hit the pause button, keep in touch and reschedule when you feel you have more (emotional capacity).
- That said sometimes even when people feel unsettled or upset by their feedback in the moment, it can be a transforming experience when they feel listened to and well supported. Our role above all else is to be the engaged companion. Be 100% present, listen, connect, ask questions.

Pre-Debrief Email example

First Email Sample to establish contact and confirm debriefing sessions

Hi xxxx

I am writing to confirm that your LSI 360 feedback session with me is scheduled for

[Day, Date, time]

We also have a follow up session post this debrief to focus on helping you translate the feedback into actions.

Prior to actually doing the debrief, it would be very useful if we could catch up via mobile or VC for about 30 mins. This would give me a chance to explain the process and the 360 feedback tool in a bit more detail. It would also give me an opportunity to learn more about you, your expectations and understand more about the areas of development you would like to focus on.

May I suggest [insert date and time options xxx]

Look forward to hearing from you

Pre-Debrief Email example

Second pre-brief Email sample to confirm debrief process/ send some preliminary softcopy materials

Great to speak with you today and I look forward to debriefing you [insert date and time]

As discussed as this is a virtual session, please ensure that

You have your lap top,

You have downloaded the VC app if needed

You are in a quiet and private room (vs in an open room with headphones)

Allow yourself 2.5- 3 hours blocked out in your diary. The debrief itself will be 2 hours (or 90 minutes) but I find that most people benefit from a bit of down time afterwards because you will be in a reflective space. Give yourself some time to process before running off to the next meeting.

In the meantime I have attached some materials for you which we will use on the day and also may be useful pre-reading for you in the lead up.

Let me know if you have any questions

Post Debrief Email Example

Post debrief email - Thanks, summary of next steps

Thank you for your time today. [add a comment that is your reflection on how the session went. E.g "It seemed like we covered a lot of ground and I look forward to working with you in our follow up session to help you take these insights into action]

(You may also want to send some materials that relate to anything you had discussed in the debrief.)

Next Steps:

Our next session is scheduled [xx Day, date and time]

To extend your awareness and increase your understanding of your feedback you can

- Read your LSI report in more detail
- Review the styles we discussed in the self development guide (specify styles and page numbers if appropriate)
- If you are comfortable speak with your respondents to gain their perspective
- Complete reflection questions prior to our follow up session