

Action Planning and Intervention

Purpose

Think back to the initial phone call with a client. If you had not gone through the previous three stages, you might have skipped to this stage and recommended a particular action step (e.g., a family retreat, a next generation advisory board, etc.) based on their requests. Having gone through the above stages, you should now have data from each family member and options that are more aligned with what your client is really looking for. Work with the family to choose the next best step for moving their work forward (e.g., values exercise, family history project, philanthropy, etc.). Sometimes you are the best person to facilitate that intervention; sometimes you are poised to recommend someone else. Either way, figure out what is the next best course of action with the family or group.

Objectives

- To learn how to be a “consultative” consultant (not an “expert” consultant) who works within the system to plan their best course of action
- To practice selecting tools from your toolbox to develop interventions
- To acquire other resources from 21/64 and the other people in the training for future interventions and referrals

Facilitation Observations