Protocols for Balancing Inquiry and Advocacy

1 Protocols for Improved Advocacy

1.1 Make your thinking process visible

What to do	What to say
State your assumptions, and describe the data that led to them.	"Here's what I think, and here's how I got there."
Explain your assumptions.	"I assumed that…"
Make your reasoning explicit.	"I came to this conclusion because…"
Explain the context of your point of view: who will be affected by what you propose, how they will be affected, and why.	
Give examples of what you propose, even if they're hypothetical or metaphorical.	"To get a clear picture of what I'm talking about, imagine that you're the customer who will be affected…"
As you speak, try to picture the other people's perspectives on what you are saying.	

1.2 Publicly test your conclusions and assumptions

What to do	What to say
Encourage others to explore your model, your assumptions, and your data.	"What do you think about what I just said?" or "Do you see any flaws in my reasoning?" or "What can you add?"
Refrain from defensiveness when your ideas are questioned. If you're advocating something worthwhile, then it will only get stronger by being tested.	
Reveal where you are least clear in your thinking. Rather than making you vulnerable, it defuses the force of advocates who are opposed to you, and invites improvement.	"Here's one aspect which you might help me think through …"
Even when advocating: listen, stay open, and encourage others to provide different views.	"Do you see it differently?"

2 Protocols for Improved Inquiry

2.1 Ask others to make their thinking process visible

What to do	What to say
Gently explore others' assumptions and find out what data they are operating from.	"What leads you to conclude that?" "What data do you have for that?" "What causes you to say that?"
Use language that is not aggressive, particularly with people who are not familiar with these skills. Ask in a way which does not provoke defensiveness or "lead the witness."	Instead of "What do you mean?" or "What's your proof?" say, "Can you help me understand your thinking here?"
Draw out their reasoning. Find out as much as you can about why they are saying what they're saying.	"What is the significance of that?" "How does this relate to your other concerns?" "Where does your reasoning go next?"
Explain your reasons for inquiring, and how your inquiry relates to your own concerns, hopes, and needs.	"I'm asking you about your assumptions here because …"

2.2 Compare your assumptions to theirs

What to do	What to say
Test what they say by asking for broader contexts, or for examples.	"How would your proposal affect… ?" "Is this similar to… ?" "Can you describe a typical example …?"
Check your understanding of what they have said.	"Am I correct that you're saying…?"
Listen for the new understanding that may emerge. Don't concentrate on preparing to destroy the other person's argument or promote your own agenda.	

3 Protocols for When You Disagree

What to do	What to say
Again, inquire about what has led the person to that view.	"How did you arrive at this view?" "Are you taking into account data that I have not considered?"
Make sure you truly understand the view.	"If I understand you correctly, you're saying that..."
Explore, listen, and offer your own views in an open way.	"Have you considered..."
Listen for the larger meaning that may come out of honest, open sharing of alternative mental models.	"When you say such-and-such, I worry that it means ..."
Raise your concerns and state what is leading you to have them.	"I have a hard time seeing that, because of this reasoning..."

4 Protocols for When You Are at An Impasse

What to do	What to say
Embrace the impasse, and tease apart the current thinking.	"What do we know for a fact?" "What do we sense is true, but have no data for yet?" "What don't we know?" "What is unknowable?"
Look for information which will help people move forward.	"What do we agree upon, and what do we disagree on?"
Ask if there is any way you might together design an experiment or inquiry which could provide new information.	
Listen to ideas as if for the first time.	
Consider each person's mental model as a piece of a larger puzzle.	"Are we starting from two very different sets of assumptions here? Where do they come from?"
Ask what data or logic might change their views.	"What, then, would have to happen before you would consider the alternative?"
Ask for the group's help in redesigning the situation.	"It feels like we're getting into an impasse and I'm afraid we might walk away without any better understanding. Have you got any ideas that will help us clarify our thinking?"
Don't let conversation stop with an 'agreement to disagree'.	"I don't understand the assumptions underlying our disagreement."
Avoid building your 'case' when someone else is speaking from a different point of view.	