

# SITUATION BRIEFING

Name: \_\_\_\_\_ Date: \_\_\_\_\_

1. SITUATION Category: \_\_\_ Opportunity \_\_\_ Challenge \_\_\_ Crisis

Intensity level: \_\_\_ (1=Low, 10=High)

Describe the SITUATION in one sentence.

2. What specific opportunity, challenge, or crisis you would like to discern?  
(Be specific. What question are you trying to answer?)

3. What background information about the SITUATION is important to understand?

4. SITUATION's current impact on you personally, the organization, culture, profitability, cash flow, customers, brand credibility, goals, suppliers, values, stewardship, etc.?

5. If nothing changes, what might be the single most +/- long term impact?

6. How have you played a role in this SITUATION and, if applicable, what's your spouse's feedback?

7. What's your ideal outcome?

8. Estimated potential \$\$\$ value of SITUATION all in: \_\_\_\_\_

**Next Steps:** We find most situations are challenging because the complexity has clouded identifying the root cause. This document will help you get to the root cause and simplify the challenge. You can use this form to discuss and create potential action steps with your team. Print it out and take it to the next meeting. Let the team ask clarifying questions before you start solving the problem.