**RELATIONSHIP FUNCTIONS:**

* What I expect from you, and what may you expect from me?
* Self-disclosure of each professional team member on their personality, leadership, communication and conflict resolution styles.
* How to balance our respective tendencies toward being more or less dominant, assertive, or vocal.
* Unique strengths and weaknesses of each professional.
* How to address power imbalances among professionals who have different skill or experience levels?
* How do you best give and receive honest feedback?
* How do you get yourself in mindset to have productive difficult conversations?
* How do we each view our respective professional roles?
* What is important about transparency to us and what are our expectations regarding transparency from others?
* What are our dispute resolution styles and preferences?
* When an attorney and the other client clash, what are our expectations about how that will be handled? Other clashes?
* What are some behaviors that build or break down trust for us?
* What does advocacy mean to each of us?
* What does trust mean to each of us?
* Periodic check-ins on what is or is not working well.

**PROCESS FUNCTIONS:**

* Are team members familiar with the Minimum Ethical Standards from IACP?
* Expectations for scheduling meetings and timing for meetings.
* How do we structure the joint sessions? Thoughts about neutrals having meetings with one client?
* How do we structure Professional Team meetings or communicate amongst professionals?
* How long to allot for professional pre-briefs and debriefs?
* How do we build process expectations to meet the financial and emotional needs of the clients?
* Are there any safety issues and if so, how to address them?
* Are there any concerns about client ability to act in own interests?
* Share expectations regarding preparation of clients for joint sessions.
* How do attorneys plan to educate clients about “the law” in balance with allowing clients to identify their interests and direct their own solutions? Issues such as: characterization; parenting plan limitations; etc.
* Expectations regarding attorney and party input during joint sessions.
* Are there other professional team members that should be considered to best address the needs of the parties? One or two coach model?
* Discuss cost of process, budgeting for particular case and individual needs; itemizing cost of each meeting; respective billing of professionals outside of meetings; review at each meeting.
* Other process functions that resonate with each professional.
* Do we anticipate “cost inflators”, time extenders, or other foreseeable pitfalls, and how to address?
* How the team addresses when case turns for the worst?

**TASK FUNCTIONS:**

* Best methods of communication for each member (email, phone, etc.)
* How does the professional team plan to coordinate and share information? Email? Cloud folder? Scheduling mechanisms?
* Expectations for response time on calls and emails.
* Expectations regarding how to balance the work between attorneys (and professionals) for meeting planning, facilitation, note taking, drafting, presenting, etc.
* How soon should progress notes be sent to the professional team and to the parties after each meeting?
* What are the fees being charged by professional team members?
* Do the parties have sufficient funds to pay for the anticipated costs? If not, how to deal with this? Should bills be circulated among all professionals/clients?
* Should financial specialist add line-item for professional fees. Revisit status of fees at each meeting?
* Billing or not for addressing team issues.
* Is billing consistent among professionals); what work or items are billed and not billed?
* Other task functions that resonate with each professional.