ROADMAP: Streamlined Protocols to Finalize Your Divorce

The Streamlined Roadmap (see table below) provides a clear picture of what the **full-team Collaborative Process** (or **Team Mediation**) entails, and helps clients be focused and motivated to stay on task. Knowing what's next also helps alleviate anxiety. Required meetings are listed in the *approximate order* of delivery.

The Roadmap also provides an overview of the roles and responsibilities for each professional and client, with greater accountability for all involved. Professionals direct the collaborative/team mediation *process*, while clients are in charge of *their decisions.* Streamlined protocols help clients significantly reduce costs as no formal team divorce process begins *until: all professionals are retained, all questionnaires and forms are completed, and all financial data are submitted and organized*. Satisfying these prerequisites significantly reduces costs by allowing professionals to synchronize their work efficiently. The team process then starts with all professionals having *all* the information needed to dive in. One drawback to Team Mediations don't offer the Disqualification Clause that a Collaborative Process does. Discuss this with your professionals before choosing one process over the other.

This Streamlined Roadmap offers a sequential timeframe of what is expected from clients and professionals. The table provides explicit meeting agendas to help ensure we all further contain costs by staying on task. The more prepared professionals and clients are, the lower client costs, the more efficient their meetings, and the fewer the meetings needed to achieve goals. *Before team meetings*, all professionals meet and prepare to ensure shared clarity about: goals, challenges, how best to help you stay focused on win-win solutions, and how we'll manage easing clients out of anxiety, any entrenched positions or upsets likely to arise. *After team meetings*, professionals must debrief to identify what worked and didn't, and to strategize about how to be more effective next time.

Typically, Additional Meetings Depend On Each Family's Needs & Dynamics:
Detours and side trips are likely needed to adapt to each family's unique needs. *Thus, more meetings are often needed*. As in any journey, your costs increase with when you need more professional intervention. Our intention is to contain costs as much as possible, while ensuring clients get quality results that attend to *all* family members' wellbeing. Please stay mindful of any budgetary concerns for divorce, with your Financial Specialist, and each professional's independent billing practices. ***All professionals stop work on your case until and unless all professionals are paid current.*** This prevents client dynamics from leveraging the withholding of payment in ways that can disrupt team cohesion and effectiveness.

Our Roadmap also aims to help clients organize their efforts and do as much as possible on their own to reduce costs. The Financial Specialist may require more meetings if clients need to better understand the their budgets, for example, or want to map out the tax/budgetary implications of different scenarios for sharing assets before these are negotiated. Clients may also need additional coaching, for example: to assist with communication or co-parenting skills, and/or manage strong emotions obstructing movement on legal or financial matters. Co-parents may be asked to engage more sessions with the Child/Adult Child Specialist to address critical child-related challenges. Similarly, clients may need more time with attorneys to understand the legal implications of specific requests and preferences, and to assure legal sufficiency. Conflict, positional attitudes, emotional reactivity, being unable to consider alternate views, for example, will increase the need for professional intervention and therefore your costs, *regardless of the divorce process you choose*.

The Streamlined Protocols Roadmap outlines Four Phases for a Collaborative Divorce/Team Mediation (with preparation for/debriefing after each meeting):

Phase 1: Commitment

Phase 2: Information-Gathering

Phase 3: Generating Options & Evaluating Choices

Phase 4: Professionals Stay Available for Possible, Future Modifications

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PHASE 1: COMMITMENT (Team Mediation or Collaborative)

Client contacts any Divorce Professional. First contact reviews & refers to Divorce Options.
Engage Client in Collab/Team Model. Explain need for *full* team. Help client engage partner/spouse.
Offer referrals to team members. Affirm that professionals steer *process*, clients steer *decisions*.
Professionals confirm protocols & adapt process based on professional team's assessments of family's needs.

Client A Attorney Meeting: Retained. Reviews: collab./medn. process, releases, doc filing, legal issues, Collab. Stip. & Order, Principles & Guidelines. Addresses any immediate needs & temporary solutions.	**Clients & Financial Specialist Meeting(s)**: FS retained, process reviewed, forms provided, Q & A, ***All*** financial data requested, submitted & organized ***before*** Team can set Collab. Stip. & Order Meeting. If requested, prep budgets for diff. scenarios before negotiations w. attys.	**Client B Attorney Meeting(s)**: Same as Attorney A
Client A Coach Meeting(s): retained, all forms signed, review process, handouts read. Identify triggers/Necessary & Difficult Conversations. Review Task List. Broad goals (then combine), ***MS** & **SDS** combined/approved. Give **PP** Worksheet. ***Parents complete 2 online courses before Collab. Stip. Meeting.*** (Parenting & Co-parenting)	**Clients & Child Specialist (CS) Meeting:** retained, all forms signed, process reviewed. Set appts. w. Minor/Adult Children per need/budget (consult FS). *MS = Mission Statement SDS = Blame-free Short Divorce Story PP = Parenting Plan	**Client B Coach Meeting(s)**: retained, all forms signed, review process, handouts read. Same as Coach A.

Team Videoconference: Professionals Only – *After* CSO Signing & Professionals Retained

Professionals share/update each other. ***Before*** **this Meeting, with Clients:** Already Reviewed, Signed & Shared these SPs, Conflict Management Protocols, Clients' Tasks Lists, Financial Docs, Collab. Stip. & Order (CSO), Principles & Guidelines, Petition & Response, Team Releases. All professionals *already* retained, their forms reviewed & signed.

3-way Client-Coach-Attorney Meeting: *As Needed*

Q & A, Review broad goals, Fin. docs, Progress on task lists, Review triggers, etc.

Professional Team Prep Meeting *Immediately Prior to Clients' Meet & Greet*

Clients' Meet & Greet: Full-Team Meeting

Clients meet all professionals. Affirm cross-talk with other professionals' client. Financial specialist (FS) as case manager: facilitates meetings, manages calendar. Agenda: Q & A, Review roles, expectations, clients' broad goals, affirm any progress, address any urgent issues. Possibly calendar *all future Full Team meetings*, allowing time for needed interim meetings, etc. depending on clients' dynamics.

Professional Team Debrief *After Clients Meet & Greet*

PHASE 2: INFORMATION-GATHERING (Clients Complete Tasks)

Client A Coach	**Financial**	**Child Specialist**	**Client B Coach**
2-way Individual Meeting(s): For Upcoming Meetings Build Skills/Prep to Manage: Necessary & difficult conversations, triggers, interests vs. positions, questions list, hot buttons, urgent issues. Create win-win PP proposals to move towards agreement.	Meets with partners to review/organize financial data to prep for full team brain-writing meeting.	Meets with Parents, & w. Minor/Adult Children. Preps for 5-way w. Coaches or informs Coaches	**2-way Individual Meeting(s)**: For Upcoming Meetings Build Skills/Prep to Manage: Same as Coach A.

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Coaches & CS Prep Prior to 5-Way - Strategize for Success

5-Way Meeting? Parents, Coaches & Child Specialist

(Before or After 4-Way PP/Co-parenting Meetings w. Coaches & Both Parents)

ID Parents'/Children's Strengths/Vulnerabilities – MHPs determine if CS has separate meetings with each Coach/Parent, or 5-way. Note CS Assessment's possible impact on Parenting Plan (PP). CS may write Feedback Summary + Remedies with Coach input: Reviews with Coaches, Shares w. Clients/Team.

Coaches & CS Debrief After Meeting

Coaches Prep Prior, Debrief After – Ongoing Consultations w. CS

4-Way PP/Co-parenting Meeting(s): As needed

Address/Mediate Differences re Parenting Plan. Finalize *before* Phase 3.

Adjust Parenting Plan Worksheet with CS Input – Prepare & Share w Clients for Input

PHASE 3: FINANCIAL BRAIN-WRITING of OPTIONS & EVALUATE CHOICES

Client A Attorney Meeting(s): Atty already reviewed PP Draft and Financial Reports. Works towards Settlement: Educates-informs client re legal view, focus on *interests* vs. positions, prep win-win proposals. Provide task checklist & referrals during/post divorce (e.g. Collab. Estate Plans, Life insurance, Social Security, etc.).	**Client B Attorney Meeting(s):** Same as Atty A. **Both** Attorneys also provide clients with post-divorce checklist of tasks (e.g. title changes, insurance changes, new trust provisions, etc.).
3-Way Coach-Client-Attorney as needed. **PP** reviewed & signed. Proposals & Prep for Full Team Financial meeting; Brain-write options prepared ahead of Full Team meeting. Consider any future Trust & Estate plans/concerns (e.g. remarriage).	**3-Way Coach-Client-Attorney** as needed. Same Coach-Client-Attorney A.

Professional Team Meets to Prep Prior

1-day Full-Team Financial Meeting(s): As Needed

Brain-write & Evaluate Choices. (CS – not unless any Professionals need.)

AM: Offer proposals. Share brain-writing options. Decide how to share income, assets & debts.
BREAK: PP - add agreed-to changes & re-sign, while FS preps scenarios based on brain-writing ideas.
PM: FS shares scenarios. Bridge gap btw. needs & financial realities. Review post-div checklist, etc.

Professionals Debrief After Meeting

Client A Attorney works to finalize Marital Settlement Agreement - meets as needed.	**Client B Attorney** – Same as Atty A. **Attys decide** which will write up. Clients share costs. Both attys review.

4-Way Signing Meeting w. Clients and Attorneys

(Others Attend Pro Bono)

Sign Final Agreement & Celebrate a Respectful Divorce!

PHASE 4: PROFESSIONALS STAY AVAILABLE FOR POSSIBLE, FUTURE MODIFICATIONS

We have thoroughly reviewed, asked questions, understood & agree to the above protocols:

Client Name: Signature: Date:

Client Name: Signature: Date: