

PURPOSE

This worksheet is designed to help leaders prepare for important conversations before they happen—so messages are intentional, expectations are clear, and outcomes are aligned.

Use this tool when preparing for:

- One-on-one conversations
- Accountability or performance conversations
- Feedback discussions
- Difficult or sensitive topics
- Team meetings

PURPOSE OF THE CONVERSATION

1

Why is this conversation necessary right now?

- What issue, concern, or goal prompted this conversation?
- What are the risks of not having this conversation?

DESIRED OUTCOME

2

What does success look like after the conversation?

- What understanding, decision, or action should result?
- How should the other person feel when the conversation ends?

KEY MESSAGE

3

What is the most important message to communicate?

- If the other person remembers only one thing, what should it be?
- Are you focusing on facts, behaviors, and impact—not assumptions?

QUESTIONS TO ASK

4

What questions will help create clarity and dialogue?

- What do I need to better understand?
- What questions will encourage openness rather than defensiveness?

LISTENING & PERSPECTIVE

5

Every conversation includes more than one perspective.

Use this section to prepare yourself to listen with intention.

- What perspective or mindset might the other person bring into this conversation?
- What experiences, pressures, or concerns may be influencing their viewpoint?
- How will I create space for them to share without interrupting or defending?

NEXT STEPS, BUY-IN & FOLLOW-UP

6

Clarity and buy-in are critical for follow-through.

Use this section to ensure shared ownership of what happens next.

- What next step(s) are we agreeing to together?
- Who is responsible for each action?
- How will we follow up or check progress?
- How will I confirm that we are aligned and committed to these next steps?

EFFECTIVE COMMUNICATION IS INTENTIONAL

Preparation creates clarity, listening builds understanding, and shared ownership drives follow-through. Use this worksheet as a guide—not a script—to support conversations that move people and work forward.