CHECKLIST 4

Preparing for Difficult Conversations

PURPOSE: *Prepare, open, run and close a difficult conversation so it stays fair, specific and focused on growth.*

Team member: *Enter name*	**Topic:** *What the conversation is about*	**Date and time:** *MM/DD/YYYY, HH:MM*	**Location:** *Private, neutral*

WHEN TO USE

Use this before performance conversations, conflicts, or sensitive discussions. Check the Red Flags first; if any applies, postpone and prepare properly.

PREPARATION

- ☐ Clarify your goal for the conversation
- ☐ Gather specific examples and facts
- ☐ Identify your emotions and set them aside
- ☐ Consider their perspective and context
- ☐ Plan your opening statement
- ☐ Anticipate their reactions
- ☐ Decide on desired outcomes
- ☐ Schedule adequate time (don’t rush)
- ☐ Choose private, neutral location

PLAN IT OUT

My goal for this conversation is:

Specific examples and facts I will cite:

My opening statement (positive intent first, then the topic):

The outcome I want when we finish:

YOUR MINDSET

- ☐ Assume positive intent
- ☐ Focus on growth, not punishment

- ☐ Approach as teachable moment
- ☐ Commit to listening, not just telling
- ☐ Be prepared to learn something
- ☐ Remember they're a whole person
- ☐ Check: Am I bringing kindness to this?

OPENING

- ☐ State your positive intent first
- ☐ Be direct about the topic
- ☐ Avoid small talk that delays the point
- ☐ Use neutral, non-judgmental language
- ☐ Express care for their success

DURING THE CONVERSATION

- ☐ Describe specific behaviors, not character
- ☐ Share impact without exaggeration
- ☐ Ask for their perspective: "Help me understand"
- ☐ Listen more than you talk
- ☐ Stay calm if they get emotional
- ☐ Acknowledge their feelings
- ☐ Focus on future, not just past
- ☐ Collaborate on solutions
- ☐ Ensure understanding before ending

CLOSING

- ☐ Summarize agreements
- ☐ Clarify next steps and owners
- ☐ Set follow-up date
- ☐ End on constructive note
- ☐ Thank them for their openness
- ☐ Reaffirm your support

AGREEMENTS AND NEXT STEPS

Owner	Action item	Due date

AFTER

- ☐ Document key points
- ☐ Follow up in writing if appropriate
- ☐ Check in soon after
- ☐ Notice behavior changes
- ☐ Provide ongoing support

RED FLAGS: POSTPONE IF

- ☐ You're too angry to be fair
- ☐ You don't have specific examples
- ☐ You haven't thought through their perspective
- ☐ You're doing this to vent, not help
- ☐ The timing is terrible (their crisis, end of day Friday)

> **Pro Tip:** The conversation goes as well as your preparation. If you can't write down your goal, your examples and your opening line, you're not ready to have it yet.