

Difficult Conversation Planner

A practical worksheet for clearer, more productive employee conversations

A difficult conversation should create clarity, not confusion.

Use this planner before a performance, conduct, attendance, conflict, or accountability conversation so you can stay factual, listen well, and leave the employee with clear expectations.

1. Define the purpose

What needs to be addressed?

Why does this conversation need to happen now?

What outcome should the conversation produce?

2. Organize the facts

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| 1 | What happened: List specific examples, dates, statements, missed expectations, or observable behavior. Avoid labels and assumptions. |
| 2 | Why it matters: Describe the impact on customers, coworkers, quality, deadlines, trust, safety, or business results. |
| 3 | What was expected: Identify the policy, standard, instruction, goal, or behavior the employee was expected to meet. |
| 4 | What has already occurred: Note prior coaching, feedback, support, training, resources, or commitments. |

3. Plan the opening

Suggested opening

"I want to talk with you about [specific issue]. My goal is to make sure we are clear about what happened, understand your perspective, and agree on what needs to happen next."

Questions that invite useful information

- Walk me through what happened from your perspective.
- What got in the way of meeting the expectation?
- What have you already tried?
- What support or clarification do you need?
- What will you do differently going forward?

4. Decide the message you need to deliver

The key point I need the employee to understand:

The expectation going forward:

The consequence if the issue continues:

The support or resources I will provide:

5. Prepare for possible reactions

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| 1 | Denial or disagreement: Return to the specific facts and the expectation. Do not argue about motives. |
| 2 | Emotion: Pause, stay calm, and allow a reasonable moment without abandoning the message. |
| 3 | Blame or deflection: Acknowledge relevant context, then redirect to the employee's responsibility and next steps. |
| 4 | New information: Listen carefully. If the information could change the decision, pause and review before proceeding. |
| 5 | Silence: Use an open question and give the employee time to respond. |

6. Close with clarity

End with a shared understanding.

Summarize the issue, restate the expectation, confirm the action steps, set a follow-up date, and document the conversation. Ask the employee to explain the next steps in their own words.

Conversation follow-up

- ☐ Send or save a brief factual summary.
- ☐ Document commitments, support, deadlines, and consequences.
- ☐ Follow up on the date promised.
- ☐ Recognize improvement when it occurs.
- ☐ Address continued problems promptly rather than restarting the process.