

DIFFICULT CONVERSATION PLANNER

Prepare for a candid conversation when the relationship and stakes both matter.

Completed by: CEO or manager	Recommended timing: Before the opening role-fit or behavior conversation
Date: _____	Situation: _____



PURPOSE

Use this tool when personal history, loyalty, emotion, or fear of damaging the relationship makes clarity difficult. The goal is to protect both the relationship and the business through honest conversation.

Prepare yourself first

Question or field	Your response
What outcome do I want for the business?	
What outcome do I want for the relationship?	
What outcome do I want for the individual?	
What am I afraid may happen?	
What have I been avoiding saying?	
How might my own behavior have reinforced the pattern?	
What emotion or trigger do I need to manage?	
What facts must be discussed?	
What conclusion have I not yet earned?	

Plan the conversation

Question or field	Your response
How will I acknowledge what is working?	
How will I state the concern in plain language?	

Which three examples will I use?	
What is the impact on the company?	
What question will help me understand the other person's perspective?	
How will I raise the role-fit question?	
What immediate boundaries must be established?	
What next step will I request?	

Conversation sequence

- 1 Begin with shared purpose and respect.
- 2 Recognize the person's contributions and current results.
- 3 Describe the behavior and impact clearly.
- 4 Ask for the person's perspective and listen.
- 5 Name the standard the role now requires.
- 6 Clarify immediate boundaries.
- 7 Agree on the next assessment or action.
- 8 Send a concise written recap.

Turn the result into action

Question or field	Your response
What was acknowledged?	
Where did we disagree?	
Immediate commitments	
Next meeting date	
What I must follow through on	

COMPLETION STANDARD Do not stop with insight. Leave with a clear behavior, an accountable owner, a date, and evidence that will show whether progress occurred.