Prepare to discuss a concern.

Stay connected. Make work better. Follow through.

> **Is the work going well?**
>
> **Is the job working well for the person doing it?**

Prepare from your own perspective. Leave unknowns open. You can skip anything you would rather discuss live.

My perspective: □ Employee □ Manager

Role / date

Use this for a concern about the work or the experience of doing it, including workload, support, communication, or a working arrangement.

Stay connected: describe the concern

What did you observe, experience or hear reported? Include an example and when it happened.

Where does this account of what happened come from?
□ Firsthand □ Reported by someone else □ Both □ Source uncertain

Optional: Why does this work matter, or what impact should be discussed? Record known effects. Do not guess.

What did you understand or expect?

If a work result is relevant: What specific work result was expected, and by when?
For a working arrangement, describe what you understood or what had been discussed. Leave unknowns open.

Make work better

What would be useful to check together?
What success means · Inputs or tools · Time or priorities · Practice or feedback · Who can make a decision · Communication · Not sure yet

> **Manager preparation:** Have you checked the actual work, how expectations were understood, available time and support, and what changed? What has the employee demonstrated before? What instruction, practice, and feedback were actually provided? Have you discussed this concern directly with them?
>
> “Not checked yet” is useful information. Check what applies to this concern.

Your account prepares the conversation. It does not establish a cause or agreement. The first useful action may be to look at an example together.

Understand the concern. Check the change.

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People in this conversation

Role / conversation date

Hear the other perspective

What did the other person add? Record what each person says, what you agree on, and any differences or unknowns that remain.

Agree on what happens next

What can each person do? What help is needed? Record an action only when its owner accepts it. Give work to the person who can do it or provide the needed support.

No new action is needed when preserving what works is enough. Use another copy if more actions are needed.

Proposed action / result: _____

Accepting owner: _____ Due date: _____

Support or dependency: _____

Expected improvement: _____

Review date: _____

Proposed action / result: _____

Accepting owner: _____ Due date: _____

Support or dependency: _____

Expected improvement: _____

Review date: _____

At the review, look at a relevant work example and ask how the change affected each person's experience.

At the review: separate action from outcome

What was completed, partly done, blocked, or changed? What actually changed for the work and the person? Record both perspectives. What remains open, and when will you return to it?

An action can be complete while the concern remains. Keep differing accounts visible. Agree what to continue, change, or close after reviewing the effect.