

The Conversation Prep Sheet

A preparation guide for high level leadership conversations.

This is a tool for owners and executives preparing to have a clear, evidence based conversation about a pattern that is affecting their organization.

Complete every section before the conversation. The act of writing it down removes emotion and grounds you in fact.

SECTION 1

The Pattern

Name the specific pattern of behavior backed by observable evidence. Not what you believe or suspect. What you can point to. Be specific and factual.

What is the pattern? Describe it in observable, evidence based terms.

When did you first notice this pattern and how long has it continued?

SECTION 2

Who and What Is Being Impacted

Identify the people, teams, and results affected by this pattern. This keeps the conversation focused on organizational impact rather than personal judgment.

Who is being affected as a result of this pattern?

How are the people or teams above being impacted ?

SECTION 3

The Impact

Specific, observable consequences of the pattern. Trust erosion, team slowdown, client outcomes, revenue effects, morale. Name what it is actually costing.

What is this pattern costing the organization in concrete, observable terms?

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SECTION 4

Core Values Being Affected

Connect the pattern to the values the organization was built on. Not as a lecture. As a reminder of the standard everyone agreed to.

Which core values or organizational standards does this pattern conflict with?

SECTION 5

The Expectation Going Forward

State clearly what needs to change, what that looks like in practice, and what accountability looks like if the pattern continues. Know this before you walk in.

What specifically needs to change and what does that look like in practice?

What is the accountability if the pattern continues after this conversation?

SECTION 6

What You Are Not Doing

You are not assigning motive. You do not know why the pattern exists and it does not matter for this conversation. What matters is what the evidence shows and what the expectation is going forward. Stay grounded in that.

Write out the one sentence that keeps you grounded if the conversation gets emotional.

**BEFORE YOU
WALK IN**

You are not assigning motive. You are naming a pattern, stating its impact, and setting a clear expectation. Lead with evidence. Stay grounded in fact. Leave room for dialogue. That is leadership.