Before the Conversation

What I want to bring into this meeting

Name:_____ Date of this conversation:_____

Quarterly one-on-one… ☐ Q1 Discover ☐ Q2 Develop ☐ Q3 Deepen ☐ Q4 Distinguish

Flex conversation… ☐ Developmental ☐ Accountability

CARRYING FORWARD

Did I follow through on my commitments since we last met? ☐ Yes, fully ☐ Partially ☐ Not yet

What commitments did this person make in our last conversation… and what is the honest status of each one?

_____

_____

What have I noticed about this person since we last met… in their work, their energy, their engagement, or their interactions with the team?

_____

_____

PREPARING MY HEART AND MIND

What does this person need most from me in this conversation today?

_____

_____

What natural strength or talent do I want to intentionally name, affirm, or create space for today?

_____

_____

What challenge or growth edge do I want to address… and how do I want to approach it with grace?

_____

_____

What do I need to set aside before I walk in… so I can show up fully present for them?

_____

_____

PREPARING TO LISTEN

What question do I most want to ask this person today… and what do I genuinely not know about where they are right now?

_____

_____

MY INTENTION FOR THIS CONVERSATION

Before this meeting begins… the one thing I most want this person to walk away feeling, and the one thing I most want to walk away knowing:

_____

_____

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The Conversation

What I want to remember

Name:_____ Date:_____

LISTEN FIRST… LET THEM BE HEARD FIRST

How are they doing… really? What did they share when I created space for them to speak first?

_____

_____

What did I hear beneath what they said… and what was on their mind that I did not anticipate?

_____

_____

AFFIRM GENUINELY… THE POSITIVE

What natural strength, talent, win, or contribution did I affirm… and did I connect it to how they are wired?

_____

_____

How did they respond to being recognized… did it seem to land, or did they deflect it?

_____

_____

ADDRESS WITH GRACE… THE GROWTH EDGE

What challenge, concern, or development opportunity did we discuss today?

_____

_____

How did they receive it… openly, defensively, or somewhere in between?

_____

_____

Is this a genuine development opportunity… or a sign that this person is being asked to consistently work against their natural wiring in ways that need to be addressed structurally?

_____

_____

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LISTEN AGAIN… THEIR VOICE AGAIN

After the growth edge was named… what did they share when I gave them space to respond?

_____

_____

Did they push back… and if so, what did I learn from listening to that?

_____

_____

Did I truly listen… or did I find myself preparing my next point while they were still speaking?

_____

_____

CLOSE WITH INTENTION… SHARED COMMITMENTS

WHO	COMMITMENT	BY WHEN
They will…		
They will…		
I will…		
I will…		

What specific encouragement did I leave them with?

_____

_____

When we will revisit progress:_____ Date of next meeting scheduled:_____

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After the Conversation

What I noticed... and how I will invest

Name:_____ Date:_____

WHAT SURPRISED ME

Was there a moment in this conversation I did not expect… a disclosure, a reaction, a strength, or a struggle that caught me off guard?

_____

_____

What will I do with what I learned… and by when?

_____

_____

WHAT I SEE IN THEM

What potential did I notice today that they may not yet see in themselves?

_____

_____

What one adjustment could I make… a repositioning, a new responsibility, a removed obstacle… that would allow them to operate more fully in their strengths?

_____

_____

WHAT IS CONCERNING ME

Is there something about this person's performance, engagement, attitude, or trajectory that is sitting with me after this conversation?

_____

_____

Is this concern new… or have I been noticing it across several conversations without naming it directly? Does it need to be escalated or documented?

_____

_____

HOW I WILL INVEST BEFORE OUR NEXT CONVERSATION

What specific action will I take to support this person's development before we meet again?

_____

_____

REFLECT HONESTLY… MY OWN LEADERSHIP

How did I show up in this conversation… honestly? Where did I listen well, where did I talk too much, and what is this person teaching me about leadership?

_____

_____

_____

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