THE ONE-ON-ONE

Field Guide

COMPANION TOOLKIT

Reusable pages for every person you lead

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BRANDY TROUT, DSL

FROM GOOD TO GRACE LEADERSHIP TOOLS COLLECTION

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Welcome to Your Companion Toolkit

Reusable pages for every person you lead

These pages were created to sit beside The One-on-One Field Guide and go with you into every meaningful conversation. The book teaches the leadership behind the conversation, and this toolkit gives you a place to practice it with each person you lead. Print as many copies as you need, for as many people as you lead, year after year. The pages are free for readers, and they will be updated over time as better tools are developed.

Every page connects to the seven stages of The Intentional Conversation Framework from Part Two: Prepare, Listen First, Affirm Genuinely, Address With Grace, Listen Again, Close With Intention, and Reflect Honestly. You do not need to answer every question on every page. Choose the prompts that serve the person in front of you, and leave the rest blank without guilt. A half-filled page from a sincere conversation is worth more than a complete page from a rushed one.

WHAT IS INSIDE

- **Team Member Profile**… for understanding each person's strengths, motivations, and goals
- **Before, During, and After conversation pages**… plus a Quarterly Conversation review
- **Developmental and accountability flex conversation templates**… for the conversations that cannot wait
- **Annual evaluation preparation and conversation template**… for the full picture of a person's growth
- **Commitment tracker**… with actions, owners, dates, and follow-up, plus a team conversation calendar
- **The complete question bank**… questions to ask the people you lead, organized by stage and situation
- **Leader self-reflection prompts**… for the end of each quarter and the end of each year
- **Documentation and confidentiality guidance**… what to write, what to leave out, and when to bring in others

A YEAR OF INTENTIONAL LEADERSHIP

- **Quarter One… DISCOVER.** Establish connection and understand the individual, including their strengths, motivations, aspirations, and room to grow.
- **Quarter Two… DEVELOP.** Build capability and encourage ownership by revisiting goals, recognizing progress, and strengthening skills.
- **Quarter Three… DEEPEN.** Strengthen trust, accountability, and confidence by addressing emerging challenges and supporting greater independence.
- **Quarter Four… DISTINGUISH.** Name what set this person's year apart, recognize the growth that mattered, and prepare for the annual evaluation.
- **Annual Evaluation… LOOK FORWARD.** Consider the full picture of this person's growth and name your shared priorities for the year ahead.

> *Before you write about the people you lead, please read the Documentation and Confidentiality Guidance at the end of this toolkit. The quarterly themes are suggestions, not rules, and an important concern should never wait for the right quarter.*

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Team Member Profile

Knowing the person I am developing

THE BASICS

Name:_____ Role or title:_____

Date they joined the team:_____ Date this profile was started:_____

Meeting rhythm I have chosen for this person:_____

WHO THEY ARE

What do I know about this person beyond their job description… their background, their story, what brought them here?

_____

_____

What matters most to them personally… family, growth, recognition, stability, impact, autonomy?

_____

_____

How do they prefer to receive feedback… directly, gently, privately, in writing?

_____

_____

How do they prefer to communicate between our meetings… text, email, in person, scheduled check-ins?

_____

_____

What motivates them to do their best work… and what quietly drains them?

_____

_____

HOW THEY ARE WIRED

Assessments they have completed, if any:_____

What natural strengths or talents do I observe in this person… the things that seem to come effortlessly to them?

_____

_____

How does this person naturally approach challenges… and does that instinctive style align with what their role asks of them most often?

_____

_____

Where do they seem most energized in their work… where do they seem to be pushing against their own grain… and what strength deserves more room?

_____

_____

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WHAT I SEE IN THEM

What potential do I see in this person that they may not yet see in themselves?

Where do I believe they are capable of going… in this role, on this team, in their career?

What is the one thing that… if developed… could significantly multiply their impact?

MY INTENTION FOR THIS PERSON

What is my primary development intention for this person this year?

What does success look like for them twelve months from now… and what is my role in helping them get there?

What kind of leader do I need to be… specifically for this person… in order for them to thrive?

What am I willing to commit to on their behalf before our first conversation even begins?

IN THEIR OWN WORDS

Use my observations as a starting point, then invite them to share their own perspective.

"What do you believe you do best, and what kind of work gives you the most energy?"

"What would you like to grow in over the next year?"

"What is the best way for me to support you?"

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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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The Quarterly Conversation

Where we are... and where we are going

Name:_____ Date of this review:_____

This quarter… ☐ Q1 Discover ☐ Q2 Develop ☐ Q3 Deepen ☐ Q4 Distinguish

LOOKING BACK AT THIS QUARTER

What is the most meaningful growth I have observed in this person over the last ninety days?

_____

_____

What commitments did they make across our conversations this quarter… and what was their honest follow-through?

_____

_____

Where did I see their natural strengths show up most powerfully… and where did I notice them working against their own grain?

_____

_____

THE HONEST MIDDLE

What patterns am I noticing across our conversations this quarter that deserve attention?

_____

_____

Is there a concern I have been carrying that has not yet been fully addressed… and what is my plan for it?

_____

_____

What did I commit to on their behalf this quarter… and did I follow through?

_____

_____

LOOKING FORWARD

What does success look like for this person in the next ninety days… specifically?

_____

_____

What goal or commitment are we naming together for the quarter ahead?

_____

_____

MY LEADERSHIP REFLECTION FOR THIS QUARTER

Am I the leader this person needs me to be right now… honestly? What will I do differently next quarter?

_____

_____

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Developmental Flex Conversation

For opportunity, growth, and recognition

Name:_____ Date:_____

WHAT PROMPTED THIS CONVERSATION

☐ A new responsibility ☐ A skill they are ready to build ☐ An accomplishment worth recognizing

☐ A stretch project or role ☐ Other:

PREPARE

What specifically did I notice that prompted this conversation?

_____

_____

What strength does this opportunity draw on… and how does it connect to how they are naturally wired?

_____

_____

Is this an opportunity they want… or one I want for them? How will I make room for an honest answer?

_____

_____

What support, training, time, or resources will they need to succeed?

_____

_____

LISTEN FIRST

What did they share about their own goals and interests before I described the opportunity?

_____

_____

AFFIRM GENUINELY

What did they do, what strength did it show, and why did it matter?

_____

_____

ADDRESS WITH GRACE… THE OPPORTUNITY

How did I describe the opportunity, the expectations, and what success will look like?

_____

_____

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LISTEN AGAIN

How did they respond… excited, hesitant, uncertain? What questions or concerns did they raise?

_____

_____

What did I learn about what they need in order to say yes with confidence… or to say no without fear?

_____

_____

CLOSE WITH INTENTION

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

Date we will revisit progress:_____ Next quarterly conversation:_____

REFLECT HONESTLY

Did I encourage this person, or did I pressure them? How do I know?

_____

_____

What does this opportunity reveal about the potential I see in them… and what is my next investment in that potential?

_____

_____

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Accountability Flex Conversation

For a concern that needs to be named now

Name:_____ Date:_____

WHAT PROMPTED THIS CONVERSATION

☐ A pattern that needs to be named ☐ A missed commitment ☐ Behavior affecting the team

☐ An expectation not being met ☐ Other:

> *Pause before you meet if the concern involves harassment or discrimination, threats or violence, safety risks, possible legal violations, medical information, protected leave, or a request for accommodation. Bring in HR or other qualified support first, and follow your organization's procedures. When you are unsure, ask for guidance, because asking is always safer than guessing.*

PREPARE… THE FACTS

What specifically happened? Describe the behavior or result I observed, with dates, rather than my interpretation of it.

_____

_____

_____

What is the expectation… and has it been clearly communicated before? When, and how?

_____

_____

Is this a skill gap, a misunderstood expectation, a structural problem, or a choice? What do I not yet know that could change my understanding?

_____

_____

What do I need to set aside before I walk in… frustration, assumptions, or a motive I have not verified?

_____

_____

LISTEN FIRST

What was their perspective on the situation before I shared mine?

_____

_____

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AFFIRM GENUINELY… THEIR VALUE, NOT A SOFTENER

What do I genuinely value about this person that they should still hear from me, separate from this concern?

_____

_____

ADDRESS WITH GRACE

How did I name the concern… the specific behavior, why it matters, and the expectation going forward?

_____

_____

What exactly needs to change, and what does improvement look like?

_____

_____

LISTEN AGAIN

How did they receive what I shared? What did they say that I may have been missing?

_____

_____

CLOSE WITH INTENTION

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

What next steps did I clearly communicate if the concern continues?

_____

_____

Date we will revisit progress:_____ Documented per policy? ☐ Yes ☐ Not needed_____

REFLECT HONESTLY

Did I speak to facts or to motives? Does this person know exactly what must change… and do they know I still believe in them?

_____

_____

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Annual Evaluation Preparation

The full picture of this person's growth

Name:_____ Year being reviewed:_____

GATHER BEFORE YOU WRITE

☐ Read back through this year's Before, During, and After pages and Quarterly Conversation reviews.

☐ Review the Team Member Profile and the Commitment Tracker for this person.

☐ Gather specific examples of contributions, growth, and concerns, with dates.

☐ Review your organization's official evaluation form and timeline.

☐ Prepare for the conversation you may actually encounter, not only the one you hope to have.

THE YEAR IN REVIEW

What is the most significant growth I have witnessed in this person over the past year… the kind that will stay with them long after this role?

_____

_____

What were their greatest contributions this year… to the team, to the culture, to the people around them?

_____

_____

What patterns emerged across our conversations this year that tell an important story about this person?

_____

_____

HOW THEY ARE WIRED… A YEAR OF OBSERVATION

Where did I observe them operating most freely and powerfully… and where did I observe them straining against their own grain?

_____

_____

Where is there a gap between what the role expects and what this person naturally brings… and is that gap a development opportunity or a structural mismatch that needs to be addressed?

_____

_____

Is this the right role for this person at this stage of their growth… and if not, what role would allow them to thrive more fully?

_____

_____

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ACCOUNTABILITY… LOOKING BACK

What commitments did this person make across our conversations this year… and what was their honest follow-through over time?

What commitments did I make to this person this year… and did I honor them?

STRENGTHS, DEVELOPMENT, AND THE YEAR AHEAD

What strength grew most this year… and how will I intentionally build on it in the year ahead?

What is the single most important development focus for this person in the year ahead?

What does success look like for this person twelve months from now… specifically and honestly?

MY COMMITMENT TO THIS PERSON

What one investment… a conversation, an opportunity, a resource, a repositioning… would make the greatest difference for this person next year?

A CLOSING REFLECTION

Can I honestly say I gave this person my best leadership this year?

What does this person deserve to hear from me… that I may not have said clearly enough this year?

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The Annual Evaluation Conversation

A summary of the story we have been writing together

Name:_____ Date of this conversation:_____

> *This template supports your organization's official evaluation process and does not replace it. Nothing discussed here should be the first time this person hears about a concern or a strength.*

LISTEN FIRST… THEIR VIEW OF THE YEAR

Ask: "As you look back on this year, what are you most proud of, and what was hardest?"

What did they share about their own year… their proudest moments, their hardest moments, and what they want next?

_____
_____
_____

AFFIRM GENUINELY… STRENGTHS AND CONTRIBUTIONS

Name each one specifically: what they did, the strength it showed, and why it mattered.

1.

_____
_____

2.

_____
_____

3.

_____
_____

ADDRESS WITH GRACE… GROWTH AREAS

Be clear about what needs to grow and why it matters, and ask for their perspective.

1.

_____
_____

2.

_____
_____

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LISTEN AGAIN

How did they receive the conversation? Where did we agree, and where did we see things differently?

_____

_____

CLOSE WITH INTENTION… SHARED PRIORITIES FOR THE YEAR AHEAD

Keep it to a small number of priorities, and include what you will do to support each one.

PRIORITY	WHAT SUCCESS LOOKS LIKE	HOW I WILL SUPPORT IT	CHECK-IN

What encouragement did I leave them with as we close this year and begin the next?

_____

_____

First check-in on these priorities:_____ Copy of official evaluation filed? ☐ Yes_____

REFLECT HONESTLY

What did this conversation teach me about this person… and about my own leadership this year?

_____

_____

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Commitment Tracker

What we said we would do... and whether we did

Name:_____ Year:_____

Record every commitment made in a conversation, by either of you. Mark the owner, set a due date, and check back before your next meeting.

DATE MADE	COMMITMENT	OWNER	DUE	FOLLOW-UP	STATUS

Owner... write ME or THEM. Status... Done, In progress, Revisit, or No longer needed.

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Team Conversation Calendar

One year of intentional conversations at a glance

Leader:_____ Year:_____

Write the date each conversation is held. An empty box is a gentle reminder of who still needs your time.

TEAM MEMBER	Q1 DISCOVER	Q2 DEVELOP	Q3 DEEPEN	Q4 DISTINGUISH	FLEX	ANNUAL

> *Think of the quarterly conversation as the floor, not the ceiling. Monthly or weekly check-ins are welcome whenever they serve the person and the work.*

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The Complete Question Bank

Questions to ask the people you lead

These are questions to ask the person sitting across from you, organized by the stages of the framework and by the kinds of conversations leaders most often face. They are starting points, not scripts, so change the words until they sound like you. Choose one or two, never all of them, and let the person's answer guide what comes next. The best follow-up question is often the simplest one… "Tell me more about that."

LISTEN FIRST… OPENING THE CONVERSATION

- Before we talk about anything I have prepared, what is most important for us to talk about today?
- How are you doing… really?
- What has been on your mind since we last talked?
- What has been going well for you lately, and what has felt heavy?
- Tell me more about that. What has been the hardest part?
- What is something you wish I knew about your work right now?

AFFIRM GENUINELY… HELPING THEM SEE THEIR STRENGTHS

- What part of your work feels most natural to you right now?
- What are you proud of from the last few months?
- When did you feel most like yourself at work recently?
- What do people tend to come to you for?
- What strength do you wish you had more room to use?

ADDRESS WITH GRACE… NAMING WHAT MATTERS

- I want to talk about something specific I have noticed, because I think it matters for you and for the team. Can we talk about it?
- How do you see what happened?
- What do you understand the expectation to be?
- What is getting in the way of meeting this expectation?
- What support would help, and what part of this is yours to own?
- What would it look like if this were going really well a month from now?

LISTEN AGAIN… AFTER THE CONCERN IS NAMED

- How are you receiving what I just shared?
- What questions do you have?
- Is there anything I may be missing?
- Where do you see this differently than I do?
- What do you believe needs to happen next?

CLOSE WITH INTENTION… SHARED COMMITMENTS

- Let us make sure we both leave with the same understanding. What are you committing to, and what am I committing to?
- What does successful follow-through look like to you?
- When should we check back in on this?
- What do you need from me before we meet again?

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- What is one thing you want to carry forward from today?

COACHING

- What part of your work feels most natural to you right now?
- Where are you stepping in when someone else could learn to take ownership?
- What have you tried so far, and what did you learn from it?
- If you were coaching someone else through this, what would you tell them?
- What is one small step you could take this week?

PERFORMANCE

- What is getting in the way of meeting this expectation?
- What support would help, and what part of this is yours to own?
- What would need to be true for you to feel confident about this part of your role?
- How will we both know that things have improved?

CONFLICT

- What do you think the other person would say is happening?
- What would working well together look like a month from now?
- What do you appreciate about the way they work, even when it frustrates you?
- What is one thing you could do differently that might change the dynamic?
- What do you need from me, and what do you not need from me, as you work through this?

ENGAGEMENT

- What gives you energy at work, and what quietly drains you?
- What would make you more excited to come to work?
- When was the last time you felt really valued here?
- What is one thing we could stop doing that would make your work better?
- Is there anything that has you thinking about whether this is still the right place for you?

DEVELOPMENT

- Where do you see yourself growing over the next year?
- What strength do you wish you had more room to use?
- What skill, if you built it, would open the most doors for you?
- What kind of work would you like to be doing two or three years from now?
- What opportunity would stretch you without overwhelming you?

TRANSITIONS

- What feels uncertain about this change, and what feels possible?
- What do you need from me as you move into what comes next?
- What are you ready to let go of, and what do you want to keep?
- Who else could help you through this transition?

QUARTERLY THEMES

- **Discover.** What do you want me to understand about how you work best?
- **Discover.** What are you hoping for this year, in your work and in your growth?
- **Develop.** Where have you made progress since we set your goals, and where do you feel stuck?

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- **Develop.** What responsibility are you ready to own more fully?
- **Deepen.** What is getting harder, and what is getting easier?
- **Deepen.** Where would you like more independence, and where would you like more support?
- **Distinguish.** What set this year apart for you?
- **Distinguish.** What growth are you most proud of, and what do you want to carry into next year?

THE ANNUAL EVALUATION

- As you look back on this year, what are you most proud of, and what was hardest?
- What do you believe were your most important contributions?
- Where did you grow the most, and where do you still want to grow?
- What did I do this year that helped you, and what could I do better?
- What would make next year your best year here?

WHEN YOU DO NOT KNOW WHAT TO SAY

- I do not have the answer yet. I will find out and come back to you by a specific date.
- I can see this matters to you. Can you help me understand more?
- Would it help to take a few minutes before we continue?
- What would be most helpful to you right now?
- Is this something you would like support with beyond what I can offer?

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Quarterly Leader Reflection

The leadership work that happens afterward

Quarter:_____ Date:_____

This page is for you, not for your team. Use it at the end of each quarter, after your quarterly conversations are complete. Answer honestly, because the answers that feel uncomfortable are usually the ones that matter most. Remember that self-reflection is not self-blame, and some of what you notice deserves acknowledgment rather than correction.

Did I hold an intentional conversation with every person I lead this quarter? If not, who did not get enough of me, and why?

_____

_____

Which commitments did I honor this quarter… and which ones did I let slip?

_____

_____

Where did I listen well… and where did I talk too much or rush to solve?

_____

_____

Is there a conversation I have been avoiding? What is it costing the person waiting for my honesty?

_____

_____

Am I carrying something that does not belong to me… someone else's choices, reactions, or unhappiness?

_____

_____

What did the people I lead teach me about leadership this quarter?

_____

_____

What is one thing I will do differently in the quarter ahead?

_____

_____

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Year-End Leader Reflection

What leading these people is teaching me

Year: _____

You have spent this year investing in the people around you, seeing their potential, naming their strengths, and holding them accountable with grace. This reflection is for the leader you are becoming through that work. Take your time here and write honestly. Give yourself the same grace you have been learning to give the people you lead.

LOOKING ACROSS THE WHOLE TEAM

As I look across all of this year's conversations… what patterns do I notice?

_____

_____

Who on my team received my best leadership this year… and who did not get enough of me?

_____

_____

Who is thriving… and who is quietly struggling in ways I may not have fully addressed?

_____

_____

MY STRENGTHS AS A LEADER

What did this year of intentional conversations reveal about my natural strengths as a leader?

_____

_____

Where did my own natural wiring serve my team well… and where did it create blind spots?

_____

_____

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MY GROWTH EDGES

Where did I avoid a difficult conversation longer than I should have… and what did that cost?

Where did I lead from fear, from habit, or from convenience… rather than from intention and grace?

What is the growth edge I am most aware of… the one I can no longer pretend I do not see?

ACCOUNTABILITY… TO MYSELF

Where did I make commitments and not follow through… and what pattern does that reveal?

Who holds me accountable as a leader… and is that enough?

WHAT THIS YEAR TAUGHT ME

What did a specific person on my team teach me about myself that I did not expect?

How am I a different leader at the end of this year than I was at the beginning?

MY COMMITMENT TO THE YEAR AHEAD

What investment in my own development would make me a better leader for the people entrusted to my care?

What is the one commitment I am making to myself as I begin again?

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Documentation and Confidentiality Guidance

Document what matters. Protect what is personal.

The pages you keep from your conversations are there to help you remember what matters, recognize patterns, and follow through on the commitments you make. They are not meant to become a record of everything a team member shares. Capture accomplishments, development goals, observable concerns, agreed expectations, and commitments that need follow-through. Write what you observed or what was agreed, rather than assigning motives or judging someone's character.

WRITE THIS… NOT THIS

WRITE WHAT YOU OBSERVED OR AGREED	AVOID MOTIVES, LABELS, AND PRIVATE DETAILS
Arrived after the scheduled start time on March 3, 10, and 17.	She clearly does not care about being on time.
Agreed to complete the new process training by April 30.	He is lazy about learning new systems.
Shared that a personal matter is affecting her schedule. Referred to HR for leave options.	Details of her diagnosis, medications, or family situation.
Said the new role feels overwhelming. We agreed on two support steps.	She can't handle pressure and is falling apart.
Led the team through the system change with patience and clear updates.	Great job!

WHAT TO LEAVE OUT OF YOUR NOTES

- Medical information, diagnoses, medications, or treatment details
- Personal crises, family matters, or relationship details
- Guesses about why someone behaved a certain way
- Labels for someone's character or personality
- Anything you would not be comfortable having the person read

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KNOW WHEN TO BRING IN OTHERS

Most concerns can and should be handled in an ordinary one-on-one conversation, but some cannot. Bring in HR, legal counsel, or other qualified support when any of the situations below are present, and follow your organization's procedures. Do not try to investigate a serious allegation on your own. Write down the facts as they were shared with you, without interpretation, and keep that information private.

☐ Harassment or discrimination

☐ Threats, violence, or safety risks

☐ Possible legal or policy violations

☐ Medical information, protected leave, or a request for accommodation

☐ A crisis that is bigger than one conversation can hold

☐ Any situation where you are unsure what to do

PROMISE DISCRETION, NEVER SECRECY

Treat every conversation with discretion, but never promise to keep something secret. Some concerns must be reported through the proper channels, and a promise you cannot keep will damage trust more than honesty would. You might say, "I will keep this as private as I can, but if what you share involves someone's safety or a legal concern, I may need to involve others." Then tell the person honestly what will happen next and who else may need to be involved.

STORING YOUR PAGES

- Keep completed pages in a secure, private place, never in shared workspaces or meeting rooms.
- Follow your organization's policies on record retention and disposal, and shred pages you no longer need.
- Remember that these pages are a leadership development tool, not a substitute for official personnel records.
- Write with the understanding that someone other than you may someday read what you wrote.

WHEN A CONVERSATION BECOMES A CRISIS

If someone is in immediate danger, call 911. In the United States, these confidential resources are available at any hour.

- **988 Suicide & Crisis Lifeline…** call or text 988
- **National Domestic Violence Hotline…** 1-800-799-7233, or text START to 88788
- **SAMHSA National Helpline…** 1-800-662-4357, for substance use and mental health support

> *This guidance is general and is not legal advice. Your organization's policies and applicable laws always come first, and HR or legal professionals can help you with specific situations.*

Document the growth. Remember the commitments. Protect the person.

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