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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