

Pre-Call Worksheet

Small-Group Leadership Development

Before your first session

Complete and return at least 24 hours before your first meeting. Use the online link when provided or fill in this PDF. For paper submissions, email a scan or clear photo to Joe at the address supplied for your meeting.

Participant | Employer | Role | First session date

1. What leadership situation do you want to handle better?

2. What happened, what have you tried, and what was the result?

3. What outcome would make the program useful?

4. What strengths can you use, and what behavior will you practice?

5. What deadline, constraint, authority, or support matters?

Participation or access needs, and AI or recording consent status after discussion

Agree on notice and consent before any recording or AI capture begins.

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Before each later session

Complete and return this page at least 24 hours before each later meeting through the provided online form, a filled PDF, or an emailed scan or photo. Use roles instead of names in examples.

Participant | Session number | Date and topic

1. Last commitment and what you actually did.

2. Observed result and evidence.

3. What worked, what did not, and what you learned.

4. Current situation and desired outcome today.

5. Question to practice or decision to make.

6. Support needed or an obstacle to discuss.