

Pre-Call Worksheet

Individual Leadership Development

Participant preparation before the first session

Required: complete and return this page at least 24 hours before your first meeting. Use the online link when provided, or email the completed PDF or a clear scan or photo to 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

Recording and AI consent will be discussed separately with Joe before any recording or AI capture begins.

Pre-Call Worksheet

Individual Leadership Development

Preparation before each later session

Required: complete and return this page at least 24 hours before each later meeting. Use the online link when provided, or email the completed PDF or a clear scan or photo to Joe. Use roles instead of names in examples.

Participant session number date and topic

Last commitment and what you actually did

Observed result and evidence

What worked what did not and what you learned

Current situation and desired outcome today

Question to practice or decision to make

Support needed or an obstacle to discuss