



Performance Conversation Prep Worksheet

How to Use This Worksheet

Before you head into a performance conversation, take ten minutes to gather your thoughts using this prep worksheet. This tool is designed to help you:

- Reflect on what you've observed.
- Clarify what needs to change.
- Identify possible support options.
- Set a clear vision for success.

You don't have to script the entire conversation, but having a game plan will help you lead with confidence, not confusion.

Pro tip: Bring this with you to the meeting (even digitally) to stay grounded and focused.

1. What specific behaviors have you observed?

2. Have expectations been clearly communicated?

3. Could outside factors be impacting performance?



4. What do you want the outcome of the conversation to be?

5. How will you open the conversation?

6. What support options can you offer?

7. What does success look like moving forward?

Every great leader struggles with tough conversations, but it's how you manage them that sets you apart.

Use this worksheet as a tool to lead with clarity, empathy, and purpose. The goal isn't perfection, its progress, one conversation at a time.