

KEY CONVERSATIONS CHECKLIST

The following is a quick checklist for when you next need to schedule and have a key conversation.

Before the Conversation

- ☐ Identify specific behaviours (not traits) to discuss
- ☐ Gather clear examples of the behaviour that you are keen to amplify
- ☐ Choose the appropriate time and neutral location
- ☐ Identify what might be the 3-point tool you could use
- ☐ Review psychological safety considerations
- ☐ Consider the other person and what might be happening in their context

Setting Up the Conversation

- ☐ Establish 3-point communication setup (shared visual focus)
- ☐ Begin with clear context and purpose
- ☐ State intention to work together toward solutions
- ☐ Be aware of potential emotional responses (clear is kind)
- ☐ Check timing works for both parties

During the Conversation

- ☐ Focus on specific behaviours, not personality
- ☐ Aim to address only one key thing (this is not the time for the laundry list)
- ☐ Use open palms and open body language
- ☐ Maintain an appropriate pace and tone
- ☐ Allow silences and emotional responses
- ☐ Take notes if appropriate
- ☐ Check for understanding regularly

Managing Emotions

- ☐ Stay below their emotional intensity if needed
- ☐ Offer breaks if needed
- ☐ Maintain a calm, clear, firm demeanour
- ☐ Acknowledge feelings without owning them

Moving to Action

- ☐ Clearly state next steps and time to reconnect
- ☐ Set timeframes for changes
- ☐ Agree on follow-up method
- ☐ Document key points and agreements

After the Conversation

- ☐ Review what helped
- ☐ Schedule follow-up
- ☐ Monitor and reinforce agreed changes
- ☐ Provide ongoing support

Remember:

The goal is clarity in order to drive behaviour change, not winning an argument.