



## Challenging Conversation Checklist

(A **GUIDE** to help plan, prepare and conduct a support and consequence conversation)

The key aspect of this approach is to support our colleague. The chat must have the feeling of a supportive chat whilst helping them steer through any possible consequences that may appear long term. Whilst consequences **MUST** be mentioned, they are being signposted so that you are saying “I want to help you avoid these”. (Some ingredients below may or may not be applicable).

### Identify and confirm:

Sense check to ensure everything is known, what the key issue(s) is and what has been done so far) including:

1.	How long have I managed the person?	
2.	How long has this issue been going?	
3.	Who else has been involved?	
4.	When did this issue first come to my attention?	
5.	Who brought it to my attention?	
6.	When did I first address/raise it with that person or HR?	
7.	When did my line manager first raise it with me?	
8.	When did I raise it with my line manager?	
9.	Bias, influence, and assumption check?	



10.	What is the main issue(s) (or break it down into parts)?	
11.	What have we discussed so far (if anything)?	
12.	What have we previously agreed needs doing and has this been done?	
13.	Have we offered and delivered any support requested and offered extra (referrals)?	
14.	Have we been clear about possible long-term impacts (consequence/discipline/job loss) previously? If not, why (must be prepared)?	
15.	Have we considered issues at home or with mental health?	
16.	Have we talked to anyone close to the person?	
17.	Has anyone noticed any behavioural, mood changes in recent months? What were they?	
18.	Has their appearance changed (dress, clothing, cleanliness, demeanour)?	
19.	General reaction to previous chats (apathy, despair, lack of self-esteem, depressed, anxiety, stress)?	



## Desired and Acceptable Outcome(s)

Always enter a conversation with at least 3 acceptable goals such as:

- a. **Preferred outcome** – Great! We will all be happy when this is actioned.
- b. **Good outcome** – Good. It’s not perfect but we’re in a good place. Review soon and address as necessary.
- c. **Acceptable outcome** – It’s not ideal but it’s fine for now. Review and adjust together as necessary (positive momentum).

20.	What are my 3 possible outcomes?	
21.	How will I introduce this discussion so we are both clear on how it will go? (Reasoning Qs).	
22.	Do I need to send anything in advance? (Be careful not to cause worry/panic).	
23.	Venue. Where will we have this? (Private, walk with coffee). <b>NO interruptions possible.</b>	
24.	Am I knowledgeable of organisational referrals available and other options? (HRBP)?	
25.	Have I sense-checked this in terms of employment law (if necessary)? (HRBP)?	
26.	How am I going to deal with tears or anger? (Need a colleague as a witness)?	
27.	How will I take notes? If applicable, gain agreement from the person.	
28.	Who will see these notes?	



## Follow-up and expectations

Ensure you both agree on what happens next:

29.	Are we both clear on what we have agreed?	
30.	Have we a clear road ahead with “confidence markers” and dates?	
31.	Are we both clear that failing to meet checkpoints may cause consequences?	
32.	Have we discussed and agreed on how to avoid unwanted consequences?	
33.	Have I made it crystal clear I want this to work and <b>shown</b> that I am supporting them?	
34.	Have I clarified requests (support etc) that they have made so I can respond ASAP?	
35.	Have I (do I need to) updated my line manager/HR/Training?	
36.	Have I updated the person and placed reminders in our calendars?	

It is **critical** that you remember that you are there to **help and support**, just as you would hope that you would be supported by your line manager and HR/HRBP (HR Business Partner) yourself.