

**START HERE**

# Prepare one conversation. Follow through on it.

**Start with the situation, not the whole book.**

You may already know which conversation you have been putting off. Start there. Describe what happened, read the closest example and prepare an opening that sounds like you. You do not need to finish the toolkit first.

**Find the right pages in your purchased toolkit.**

In the 91-page PDF edition 4.7: difficult conversations begin on PDF page 11; use the preparation page on page 14. For work not being completed, begin on page 15 and use the accountability and support plan on page 18. These are overall PDF page numbers.

**A useful first session**

Allow about 15-20 minutes for preparation, not for resolving the issue. Write the observed behavior, its impact, two questions and the next step you want to discuss. Use the working page in this companion if you need a short starting point.

**What this companion adds**

Three fictional OR examples, a fillable preparation page and a plan for trying the approach this week. The full toolkit adds detailed lessons and working pages. This companion is free to use, with or without a purchase.

**Keep the work appropriate.**

Use your authority and organizational processes. A safety concern may need immediate action before a coaching conversation. Keep patient, personnel and confidential business information in approved workplace systems.

## FICTIONAL EXAMPLE 1

# When agreed work is not finished.

**The situation**

A coordinator agreed to review a service-line orientation checklist by Friday. Monday arrives and the review is incomplete. You do not yet know whether time, unclear expectations, missing input or follow-through caused the delay.

**Check before you conclude**

Confirm what was agreed, whether the deadline was understood and whether the protected time you promised was actually available. Do not treat a missing resource as proof that someone refused the work.

**A natural opening**

"We agreed to review the checklist by Friday, and it is not complete yet. I want to understand what got in the way, including whether you had the time we discussed."

**What changes your response**

In this example, the coordinator was pulled into coverage. You acknowledge the lost preparation time and discuss a smaller next step with a realistic deadline. If the time and support were available, explore the reason for the missed work and clarify expectations; do not assume the same response fits both situations.

**Close with a clear agreement**

Agree which section will be reviewed, who will provide missing input and when you will check progress. Ask the coordinator to explain the plan back in their own words. At the check-in, look together at what was actually finished.

**At review**

Check the actual work and whether the promised support was provided. Record what remains unresolved. Use the formal process when required; this example is routine leadership preparation, not a disciplinary procedure.

## FICTIONAL EXAMPLE 2

# Stand beside the board runner.

**The situation**

A surgeon asks for a different team and a flip room. The charge nurse running the board has explained the assignment, but the surgeon is frustrated and asks you to overrule it.

**Check the issue, then support the decision.**

Confirm the team is appropriate for the work under local requirements and ask whether the surgeon is raising a specific capability or safety concern. Verify staffing, room availability and the reason for the assignment. Supporting a colleague does not mean ignoring new information.

**A natural opening**

"I understand you would prefer a different team. Based on the staffing and assignments we have reviewed, I support this plan. Is there a specific concern about the team's preparation that we need to address?"

**Separate preference from a new concern.**

A preference alone does not establish that a reassignment is needed. A specific capability or safety concern needs prompt assessment through the proper process. Do not promise a flip room before the staffing and resource plan is authorized.

**After the interaction**

Check in privately with the charge nurse. Ask how the conversation felt from their side, whether your support helped and what still needs to be clarified. If inappropriate conduct occurred, follow the reporting process; do not minimize it because the schedule continued.

**What to review**

Did the assignment remain appropriate? Was any concern addressed? Did the team receive consistent direction? A surgeon walking away does not, by itself, mean the relationship issue is resolved.

## FICTIONAL EXAMPLE 3

# Disagree without promising what you cannot control.

**The situation**

An additional room is requested without a confirmed staffing plan. You anticipate late finishes and difficulty covering breaks. The decision belongs to a leader above you, but you are responsible for explaining the operational effects.

**Make the concern specific.**

Confirm available staff, competencies, expected finish times and break coverage with the responsible teams. Separate what is known from what is only a possibility. Escalate immediate safety concerns through the required process.

**A natural opening**

"Before we confirm the additional room, can we review the staffing plan? With the current assignments, I cannot identify coverage for these breaks or the expected finish. We need an agreed plan before we make that commitment."

**Bring options to the discussion.**

Ask the authorized leader to consider the available options and their effects. These may include confirming additional qualified coverage or revising the proposed schedule under local policy. Do not invent a safe staffing number or make a clinical prioritization decision from this worksheet.

**What you can promise staff**

"I will raise the concern, follow up on the decision and update you by the time we agree. I cannot promise the request will be approved, but I can tell you what is known and what is still pending."

**If the discussion is dismissed**

Restate the unresolved operational issue, use the appropriate escalation route and keep required records in the approved system. If you still do not have an answer, say so. Arrange a follow-up and consider how earlier planning could help next time.

**PRACTICAL IMPLEMENTATION**

# Prepare your own conversation.

**Keep it brief.**

Use roles rather than names. Put formal records in approved systems. These fields have fixed space; save a copy and test one nonsensitive entry before relying on your PDF app.

**What happened? What have I verified?****Why does it matter? What remains uncertain?****My opening and two questions****What happens next, who will help and when to check back**

**FOLLOW-THROUGH**

# Use it this week.

**Day 1: choose and prepare**

Choose one appropriate conversation. Read the matching lesson and prepare your opening. Check that the facts, timing and setting are appropriate.

**Days 2-3: listen and agree**

Have the conversation when feasible. Ask for the other person's account. Agree the action and support rather than reading a prepared speech at them. If the issue requires a formal route, use it.

**Days 4-6: provide your part**

Provide the support you agreed to. If the plan changes, communicate it. Keep the actual commitment in your approved work system or calendar.

**Day 7 or the agreed review: check the work**

What was completed? Did you provide the support you promised? What still needs attention? A calmer conversation matters, but check whether the work changed too.

**Before you move on**

Can the other person explain the expectation? Is the action feasible? Is the support clear? Is there a real review date? If one answer is no, clarify the plan before calling the issue resolved.

**Continue only where useful.**

Use the toolkit's deeper examples for a different challenge. No additional product or video is required to use this companion. For file help or feedback, visit [westclinicalleadership.com/contact](https://westclinicalleadership.com/contact). Do not send confidential case details.