
ONE BOOKMARKED PDF | CUSTOMER EDITION 4.7

Leadership Decision Desk

Prepare the conversation you need to have.

Start with the conversation you need. For difficult conversations, read PDF pages 11-13 and prepare page 14. For a quick OR opening, go to pages 74-81. Use the bookmarks to jump there.

Your first useful session

Start with the conversation you need to have. Check what happened, prepare your opening and agree on the next step. Make time to check back.

Read, write and save

Use the contents on the next page or your PDF reader's bookmarks. Fillable worksheets remain interactive. Save a working copy; enter a nonsensitive test line, close and reopen before relying on the app to save longer work. Fields do not expand or calculate.

Use it responsibly

Examples are fictional teaching material. Apply your organization's policies and your role's authority. Keep patient, personnel and confidential business details in approved systems. Urgent clinical or safety concerns follow the required process immediately.

What this edition includes

The complete guides and worksheets are together in this one PDF. No ZIP extraction is needed. Individual professional use; coaching, CE contact hours and department distribution are not included.

LESSON 02 / WORKED EXAMPLE

The employee becomes tearful

Fictional case. The completed decision shows the reasoning, action and review.

The opening

A new coordinator missed two routine status updates. The manager describes the dates and effect without saying “you are unreliable.” The coordinator becomes tearful and says, “I am trying; everyone thinks I cannot do this.” The manager pauses: “I can see this is difficult. We can take a few minutes. We still need a workable plan for the updates.”

What the manager learns

After the pause, the coordinator explains that two managers request different formats and the shared report is inaccessible. The manager checks the access issue and confirms the conflicting instructions. The coordinator also says they waited for a perfect answer rather than flagging the barrier. Both the system problem and the missed escalation need attention.

Completed agreement

The manager accepts responsibility for agreeing one format with the other manager and arranging access through the authorized route. The coordinator will send the available status and flag missing information by the agreed checkpoint. They rehearse one brief escalation message. The manager asks for teach-back and sets a three-workday check-in.

Fictional review

Two updates arrive as agreed. Before the third is due, the coordinator explains what information is still missing. The manager thanks them for raising it early and helps obtain it. At the next review, they check whether the arrangement works without repeated reminders.

LESSON 02 / APPLY

Conversation preparation page

Complete this page with a fictional or nonconfidential example. Move real commitments into the approved work system.

Write language you could say naturally. Use prompts, not a script you must read word for word.

What happened, its effect, the expectation and facts to check**Your opening and two questions about the task or barriers****Response to emotion or disagreement; what remains required?****Their action, your support, their understanding and check-in date****What to review, where to record it and when to involve another leader**

Before acting: confirm who agreed to do the work, any approval needed and the check-in date.

OR OPENING LINES | Adapt the words to the verified facts

OR conversations 04-06

04 | A turnover discussion turns into blame

CHECK: Check the same turnover interval and comparable cases; separate required work from avoidable waits.

SAY: "Which part of the turnover is waiting, and which part is necessary work? Let's identify the step before blaming a team."

NEXT: Review the sequence with the affected teams and select one feasible change.

REVIEW: Check the interval, rework and delays shifted to another department.

05 | A tray is not ready for tomorrow's list

CHECK: Verify the concern with sterile processing using approved systems and confirm who needs the update.

SAY: "Which instruments are still unresolved, who is checking them, and when will we know whether the planned list is supported?"

NEXT: Use the local readiness and escalation process; do not assume a substitute is acceptable.

REVIEW: Confirm the receiving team acknowledged the update and the issue has an assigned next step.

06 | An add-on exceeds the apparent capacity

CHECK: Check urgency through the authorized clinical process, case requirements, staffing and downstream capacity.

SAY: "Before we promise a time, can we confirm the priority and the support this case needs?"

NEXT: Bring unresolved capacity and priority decisions to the responsible clinical and operational leaders.

REVIEW: Communicate the approved plan and any effects on other cases through approved channels.