

FREE OR CONVERSATION CARD | One situation. One useful next step.

Prepare the conversation

1 | Name the situation

What happened? What is the operational effect? Write the event, not a label such as poor attitude. An active clinical or safety concern follows the required immediate process, not this worksheet.

2 | Check the facts

What is verified, what is still unknown, and who can clarify it? For a late start, distinguish the scheduled time, the local start definition and the readiness sequence.

3 | Open without assigning motive

"Here is what I understand happened and why it matters. What am I missing?" For a delay dispute: "Before we assign a cause, let's review when each part of the team was ready."

4 | Agree the next action

What will they do? What support will you provide? Who must approve the plan? Confirm that the responsible people understand and can take the work.

5 | Set the review

When will you check back? What would show progress? What could become harder for another team? Recognize good follow-through and address unfinished work.

Keep it usable

Use general notes only. Keep confidential records in approved systems. Adapt the language to your role and local policy. More worked examples:

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