



# Difficult Conversation Preparation Workbook

Based on the Biz Bite: A Leader's Guide to Having Difficult Conversations

## Presenter

Ray Hoppins  
Hoppins People Services

## Video

Use the QR code or link to watch the recording:  
[youtu.be/04K-f8Zdw24](https://youtu.be/04K-f8Zdw24)



## How to use this workbook

This workbook helps business owners, managers, supervisors, and team leads prepare for difficult workplace conversations before they become bigger problems. Use it to clarify the issue, protect the person's dignity, create safety, ask for perspective, and move toward resolution.

**Core idea: Pierce the bubble early. The longer a sensitive issue is avoided, the more emotion, assumptions, gossip, and frustration can build around it.**

## The conversation roadmap

| No. | Focus                                   | What to do                                                                                                |
|-----|-----------------------------------------|-----------------------------------------------------------------------------------------------------------|
| 1   | Decide if the conversation is necessary | Use frequency, intensity, and time. If you are losing sleep or would want to know, have the conversation. |
| 2   | Separate facts from stories             | Identify what happened without adding assumptions about intention or character.                           |
| 3   | Plan the first 30 seconds               | Choose the time, place, opening line, tone, and safety message before you start.                          |
| 4   | Describe and ask                        | Describe what you noticed, then stop talking and ask for the other person's perspective.                  |
| 5   | Resolve and close the loop              | Agree on next steps, protect confidentiality, and check back after the conversation.                      |



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### 1. Decide whether the conversation is necessary

Not every irritation needs a formal conversation. Ray Hoppins recommends asking whether the issue is frequent, intense, recent, or important enough that you would want to know if it were about you.

#### Frequency, intensity, and time check

| Question                                       | Your notes |
|------------------------------------------------|------------|
| Frequency: How often has this happened?        |            |
| Intensity: How serious is the issue or impact? |            |
| Time: How recent is the issue?                 |            |
| Would I want to know if this was about me?     |            |
| What problem am I trying to solve?             |            |

#### Decision prompt

**Have the conversation when delay is increasing stress, damaging trust, creating gossip, affecting performance, or causing you or someone else to lose sleep.**

#### My decision

|                                                                                                   |                                                                                          |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <input type="checkbox"/> I will have the conversation.                                            | <input type="checkbox"/> I will seek confidential advice first.                          |
| <input type="checkbox"/> I will monitor the situation because it does not yet meet the threshold. | <input type="checkbox"/> I will get HR, safety, or leadership support before proceeding. |



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## 2. Separate facts from stories

Difficult conversations often become harder when we add assumptions. The fact may be simple: someone is late, a post was made, a parking space was used, or a customer interaction went poorly. The story is what we add about motive, character, or intent.

### Facts vs. stories worksheet

| Facts I can verify | Stories or assumptions I may be adding |
|--------------------|----------------------------------------|
|                    |                                        |
|                    |                                        |
|                    |                                        |

### Confidential advice - not gossip

It can be useful to get advice from a trusted leader or advisor. It is not useful to tell several people that you are about to have the conversation. Protecting confidentiality protects dignity and reduces drama.

### Before I speak, I will check:

|                                                                       |                                                                            |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------|
| <input type="checkbox"/> I know the specific issue I need to address. | <input type="checkbox"/> I have separated facts from assumptions.          |
| <input type="checkbox"/> I have chosen a private setting.             | <input type="checkbox"/> I have not talked about the person unnecessarily. |
| <input type="checkbox"/> I can speak calmly and respectfully.         | <input type="checkbox"/> I am ready to ask for their perspective.          |



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### 3. Plan the first 30 seconds

The first 30 seconds can determine whether the person feels safe enough to participate. Plan the opening line, tone, and setting before the conversation begins.

#### Opening line builder

| Element                                    | Write your words |
|--------------------------------------------|------------------|
| Purpose: Why are we meeting?               |                  |
| Fact: What did I notice?                   |                  |
| Safety: How will I show I am here to help? |                  |
| Perspective: What question will I ask?     |                  |

#### Simple opening script

**"I wanted to check in about [issue]. I noticed [facts]. I am here to understand and work this out. What is your perspective?"**

#### Tone and body language reminder

In sensitive conversations, tone, body language, closeness, pacing, and facial expression carry a lot of meaning. Breathe, pause, sit down, and start calmly.



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### 4. Describe the issue and ask for perspective

The purpose is not to win the conversation. The purpose is to understand what is happening and move toward a solution. Describe briefly, then stop talking and listen.

#### Describe - Ask - Listen

| Step            | Prompt                                   | Your notes |
|-----------------|------------------------------------------|------------|
| <b>Describe</b> | What did I observe?                      |            |
| <b>Ask</b>      | What perspective do I need to hear?      |            |
| <b>Listen</b>   | What might I be missing?                 |            |
| <b>Clarify</b>  | What support or structure may be needed? |            |

#### Practice scenario

You see a public post from an employee that names the organization and expresses frustration. What is your opening line?

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**Ray's example: "I saw the post and I am sorry there is frustration there. I am here to help. I want to understand your perspective, and I do think we can work it out."**



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### 5. Move to resolution and close the loop

Once the issue is clear and the person feels safe enough to participate, move toward action. Keep the solution practical, specific, and respectful.

#### Resolution planning worksheet

| Question                                        | Decision or agreement |
|-------------------------------------------------|-----------------------|
| What needs to change?                           |                       |
| What support, training, or structure is needed? |                       |
| What will each person do next?                  |                       |
| When will we check back?                        |                       |
| What should stay confidential?                  |                       |

#### Fairness check

Closing question: "Have I treated you fairly today?"

#### Follow-up reminder

Check back after the conversation. A short follow-up can confirm progress, protect the relationship, and reduce the chance that the issue grows again.



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### 6. What to avoid and when to pause

Some approaches make difficult conversations worse. Use this list as a final check before you begin.

#### Avoid these traps

|                                                                        |                                                                   |
|------------------------------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> Group scolding or broad emails                | <input type="checkbox"/> Texting about sensitive issues           |
| <input type="checkbox"/> Changing a whole policy because of one person | <input type="checkbox"/> Taking away the person's dignity         |
| <input type="checkbox"/> Making assumptions about intent               | <input type="checkbox"/> Shifting blame to unnamed others         |
| <input type="checkbox"/> Sandwich feedback                             | <input type="checkbox"/> Over-framing before getting to the point |

#### If the conversation becomes unsafe

**Pause it. Park it. Leave if needed. Get support before restarting. No one deserves abuse during a workplace conversation.**

#### My next three commitments

| Commitment | What I will do |
|------------|----------------|
| 1          |                |
| 2          |                |
| 3          |                |

**Source:** Biz Bite: A Leader's Guide to Having Difficult Conversations, presented by Ray Hoppins, Hoppins People Services.