



Manager's Guide to Difficult Conversations

Prep Checklist

- Define the core issue (behavior/impact) and desired outcome.
- Gather examples, dates, prior coaching notes/PIP.
- Book a private meeting; invite HR if appropriate.
- Plan next steps and timelines (training, milestones, check-ins).

Framework: SBI + Next Step

"In Monday's client call (Situation), you spoke over the client twice (Behavior), which hurt trust (Impact). Going forward, pause and confirm before responding. Let's role-play for next time (Next Step)."

Scenario Scripts

Performance: "We set [expectation] on [date]. The deliverable didn't meet the standard. Here's what 'meets expectations' looks like. Let's agree on milestones for the next two weeks and meet again on [date]."

Attendance: "We've seen [late/absences] on [dates]. It impacts coverage. Our policy requires [standard]. Going forward, we need [expectation]. Continued issues may lead to formal action."

Conduct/Conflict: "The interaction on [date] didn't meet our respectful workplace standard. Going forward, here's what's expected. HR can support training or mediation as needed."

Pay/Promotion: "Here's how compensation decisions are made. Based on level, scope, and market, the increase is [X]. Here's your path to the next level."

Do / Don't

- Do: Be specific, timely, and calm; document outcomes.
- Do: Ask for their perspective; listen actively.
- Don't: Debate intent; focus on behavior and impact.
- Don't: Threaten; state consequences per policy where appropriate.





Documentation Template

Date: ____ Employee: ____ Manager: ____

Topic: ____

Summary (SBI): ____

Agreed Next Steps: ____ Due: ____

Follow-Up Date: ____

Follow-Up Email Template

Subject: Recap of our discussion on [topic]

Thanks for meeting today. We discussed [summary]. We agreed on these next steps: [steps & dates]. I'll check in on [date]. Please reply if I missed anything.

Thanks,
[Manager]

When to Involve HR

- Safety concerns, harassment or discrimination allegations, medical or accommodation requests.
- Performance or attendance issues that persist after coaching.
- Any situation involving potential termination or legal risk.



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