



WORKPLACE CONVERSATIONS

A Practical Guide for Managers

PREPARE ♦ TALK ♦ LISTEN ♦ ACT

A modern, inclusive workbook for everyday coaching and difficult workplace conversations.

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2026 EDITION. Updated for hybrid work, neuroinclusive communication, employee privacy, psychological safety, AI-enabled work, and current manager responsibilities.

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How to use this guide

This is a preparation and reflection tool, not a script you must follow word for word.

1. Read the foundations and CLEAR framework before using a playbook.
2. Choose the playbook closest to your situation. Combining topics can confuse the meeting's purpose.
3. Prepare facts, examples, questions, and the outcome needed. Separate observations from inferences.
4. Adapt the channel, pacing, and format to the employee and the sensitivity of the topic.
5. End with shared understanding, ownership, timing, and follow-up.
6. When a concern may involve protected rights, safety, harassment, discrimination, retaliation, leave, pay, or accommodation, follow policy and involve the proper resource promptly.

A GUIDE, NOT LEGAL ADVICE. Requirements vary by jurisdiction, industry, bargaining status, employer size, and policy. Managers should not investigate, diagnose, promise confidentiality, approve accommodations or leave, or make disciplinary commitments outside their authority.

What changed in the 2026 edition

- Behavior-based communication replaced personality typing by appearance, tone, or broad labels.
- The guide now addresses hybrid work, digital channels, AI-enabled work, workload, change, and psychological safety.
- Sensitive topics include clearer privacy boundaries and escalation guidance.
- Gendered wording, generational assumptions, and labels such as 'negative attitude' were removed.
- Each playbook emphasizes observable facts, employee perspective, fair process, documentation, and follow-through.

The essentials of a respectful conversation

Be timely

Address routine issues early. Escalate urgent safety, harassment, discrimination, retaliation, or legal concerns immediately.

Be specific

Use dates, examples, work outputs, stated expectations, and observable behavior. Avoid labels, motives, hearsay, and character judgments.

Be curious

Ask open questions and allow time to process. Your first explanation may not be the complete picture.

Be fair

Apply expectations consistently while considering legitimate differences in role, access, disability, leave, schedule, and work context.

Be private

Use a confidential workplace setting or secure virtual meeting. A public café is rarely appropriate for sensitive employment matters.

Be clear

Explain the purpose, decision, or expectation, what is open for discussion, and what happens next.

Be human

Respect emotion without becoming the employee's therapist, investigator, or medical decision-maker.

Be accountable

Do what you said you would do. Document material commitments and revisit them.

AVOID THE PRAISE SANDWICH. Do not hide important feedback between compliments.
Start respectfully, state the purpose directly, discuss facts and impact, then collaborate on next steps.

Communication preferences without labels

Adapt communication based on what the person tells you and what supports the work, not on stereotypes or a personality category.

Pace

Would an agenda or time to think before responding help?

Format

Is the topic clearer in writing, live conversation, visuals, examples, or a combination?

Detail

What context is needed to understand the decision, expectation, or request?

Directness

Use plain, respectful language. Do not rely on hints, implied meanings, or forced eye contact.

Environment

Reduce avoidable noise, interruptions, sensory distractions, and audience pressure.

Processing

Pause after asking a question. Offer a chance to add thoughts after the meeting.

Access

Use captions, accessible documents, interpreters, assistive technology, or other approved supports when needed.

ASK, DO NOT GUESS. Try: 'What would make this conversation easiest to process?' or 'Would it help if I sent the main points in writing after we talk?'

Signals are context, not proof

Tone, facial expression, eye contact, movement, silence, and response speed vary across cultures, disabilities, neurotypes, personalities, stress levels, and settings. Do not treat a single cue as evidence of attitude, honesty, engagement, or intent.

Listening, empathy, and clarity

Attend

Remove distractions and listen for facts, meaning, emotion, and what the person is asking for.

Invite

Use open questions: 'What happened from your perspective?' 'What am I missing?' 'What would help?'

Reflect

Paraphrase without exaggerating: 'What I hear is...' or 'It sounds as though the key concern is...'

Clarify

Check terms, examples, timing, impact, and areas of agreement or difference.

Acknowledge

Recognize the experience without automatically agreeing: 'I can see why that was frustrating.'

Respond

State what you can do, what you cannot decide, who needs to be involved, and when you will follow up.

Useful phrases

- Take the time you need. I can pause.
- I want to make sure I understand before I respond.
- We may remember this differently. Let us look at the specific examples.
- I do not know yet. I will check and follow up by [date].
- I cannot promise confidentiality, but I will share information only with people who need it to respond.

The CLEAR conversation framework

C - Clarify the purpose

Name the topic, why it matters, and the outcome needed.

L - Listen and learn

Invite the employee's perspective, ask open questions, and check understanding.

E - Explore facts and impact

Discuss observable examples, relevant expectations, context, and effects on work or people.

A - Agree on action

Define decisions, actions, support, ownership, measures, and timing.

R - Revisit

Document what matters, follow through, and check progress or new information.

BEFORE YOU BEGIN: Am I calm enough to be constructive? Do I have first-hand facts? Is the employee entitled to notice, representation, accommodation, or a specific process? Is anyone's immediate safety at risk?

A SIMPLE OPENING: 'I would like to talk about [topic]. My goal is to understand what is happening, share what I have observed, and agree on next steps. I want to hear your perspective.'

Choosing the channel and setting

CONVERSATION	RECOMMENDED SETTING
Routine coaching	Private in-person or secure video/phone; written recap as needed.
Complex feedback	Private live conversation with examples; allow time for questions and processing.
Recognition	Use the employee's preference; never assume public recognition is welcome.
Sensitive personal or health matter	Use a private workplace or secure virtual setting; limit details and involve the proper resource.
Formal performance or policy matter	Use the required process; include HR or a representative when applicable.
Urgent safety or harassment concern	Follow reporting and emergency procedures immediately.
Distributed or asynchronous work	Provide context in writing, then offer a live channel when nuance or emotion matters.

Avoid recording workplace conversations unless authorized by policy and lawful in the relevant jurisdiction.

Documenting and following up

- Record the date, purpose, key facts, employee perspective, decisions, actions, owners, and follow-up date.
- Use neutral language. Write what was said or observed, not a diagnosis or character judgment.
- Store documentation in the appropriate system and respect access restrictions.
- Correct material errors. Do not rewrite notes to make the conversation appear more favorable.

When to pause and involve the right resource

Stop improvising and contact the designated internal resource when a conversation raises:

- A request or possible need for disability, religious, pregnancy-related, or other accommodation
- A serious health condition, family or medical leave, workers' compensation, or extended absence
- Harassment, discrimination, retaliation, threats, violence, self-harm, stalking, or safety concerns
- Wage, hour, pay-equity, scheduling, collective concerns, protected concerted activity, or union representation issues
- Fraud, theft, conflicts of interest, data privacy, cybersecurity, or ethics and compliance concerns
- Formal discipline, investigation, termination, or a matter outside your authority
- A concern involving you personally where you may not be impartial

MANAGER BOUNDARY: Receive the concern respectfully, preserve relevant information, explain that you must use the proper resource, and avoid promising a particular outcome or complete confidentiality.

A SAFE RESPONSE: 'Thank you for telling me. I am taking this seriously. I need to involve [HR/Employee Relations/Compliance/Safety] so the concern can be handled appropriately.'

Regular check-in

Maintain alignment, trust, support, and early problem-solving without turning every meeting into a status report.

Prepare

- Review commitments and current priorities.
- Leave room for the employee's agenda.
- Notice accomplishments, barriers, and workload signals.

OPEN: What would be most useful to cover today?

Questions to consider

- What is going well?
- Where are you stuck?
- What has changed?
- What do you need from me?
- What should we revisit next time?

CLOSE: Confirm priorities, decisions, support, and the next check-in.

Avoid

Repeatedly canceling, dominating the agenda, or using the meeting only to assign work.

My notes

Giving feedback

Reinforce effective work or help an employee adjust behavior, approach, or results while the information is useful.

Prepare

- Use a specific, first-hand example.
- Separate intent from impact.
- Know the relevant expectation or desired result.

OPEN: I want to share an observation that may help with [result]. Is now a workable time?

Questions to consider

- How did you see the situation?
- What factors influenced your approach?
- What would you repeat or change?
- What support or feedback would help?

CLOSE: Agree on what will continue or change, evidence, and follow-up.

Avoid

Vague labels, style-based feedback, public correction, or surprises at review time.

My notes

Recognition

Make a specific contribution visible and reinforce its impact.

Prepare

- Identify the contribution and impact.
- Know whether private or public recognition is preferred.
- Consider whether recognition is distributed fairly.

OPEN: I want to recognize the way you [specific contribution].

Questions to consider

- What helped make this successful?
- Who else contributed?
- How would you like this recognized?
- What could we repeat?

CLOSE: Connect the contribution to customers, goals, values, or learning.

Avoid

Generic praise, taking credit, unequal visibility, or rewarding reliability only with more work.

My notes

Performance concern

Clarify a material gap between expected and observed performance and establish a fair path forward.

Prepare

- Verify the standard, facts, prior communication, and required process.
- Consider training, resources, workload, clarity, access, and protected issues.
- Coordinate with HR when required.

OPEN: I need to discuss a performance concern related to [specific expectation]. I want to understand your perspective.

Questions to consider

- What happened from your perspective?
- Was the expectation clear?
- What barriers should I understand?
- What needs to change?
- What support is appropriate?

CLOSE: State the expected result, measures, support, timing, and authorized consequences.

Avoid

Diagnosing motivation, debating personality, using unverified complaints, or prejudging the process.

My notes

Work objectives and priorities

Create clarity about outcomes, tradeoffs, decision rights, and what matters most.

Prepare

- Identify required outcomes and why they matter.
- Distinguish priorities from preferences.
- Be ready to make trade-offs.

OPEN: Let us align the outcomes, priorities, and decisions for this period.

Questions to consider

- What does success look like?
- Which priority is at risk?
- What dependencies are unresolved?
- What should stop, start, or wait?
- Where is more authority needed?

CLOSE: Document outcomes, measures, owners, decision points, and review dates.

Avoid

Calling everything urgent or assigning accountability without authority.

My notes

Workload and capacity

Address sustained overload, competing demands, missed recovery time, or uneven distribution.

Prepare

- Review commitments, deadlines, staffing, and interruptions.
- Consider equity in invisible work.
- Identify what can stop, wait, delegate, or simplify.

OPEN: I want to understand your current workload and make explicit tradeoffs.

Questions to consider

- What takes the most time?
- Which commitments conflict?
- What is at risk?
- What work is less visible?
- What should we deprioritize?

CLOSE: Agree on a realistic workload plan and near-term review.

Avoid

Offering only time-management advice when the workload itself is unreasonable.

My notes

Career growth

Connect aspirations and strengths with skills, experiences, and organizational needs.

Prepare

- Review accomplishments, strengths, feedback, and possibilities.
- Consider more than promotion.
- Be candid about timing and constraints.

OPEN: I would like to understand how you want to grow and identify one practical next step.

Questions to consider

- What work gives you energy?
- Which strengths do you want to use more?
- What skills or experiences interest you?
- What paths might you explore?
- What support would help?

CLOSE: Agree on one 90-day goal, ownership, support, evidence, and follow-up.

Avoid

Assuming ambition, promising a role, or offering growth only to self-promoters.

My notes

Strengths and interests

Discover capabilities and interests that may improve contribution, engagement, and assignment fit.

Prepare

- Bring specific examples.
- Separate strengths from labels.
- Consider whether assignments allow capability to be demonstrated.

OPEN: I have noticed strengths in [examples], and I would like to hear what you see.

Questions to consider

- What comes naturally?
- What do others ask your help with?
- Which skills are underused?
- What would you like to try?
- Where could this support priorities?

CLOSE: Choose a low-risk opportunity to apply a strength and get feedback.

Avoid

Pigeonholing someone or turning personal interests into unpaid extra work.

My notes

Learning and development

Build capability through experience, practice, feedback, relationships, and formal learning.

Prepare

- Define the capability and business connection.
- Check access, workload, budget, and application.
- Consider experts, mentoring, stretch work, and communities.

OPEN: Let us identify the capability that would make the greatest difference and how you can practice it.

Questions to consider

- What do you need to do differently?
- Where can you practice?
- Who could provide feedback?
- What resource would add value?
- How will we know learning transferred?

CLOSE: Set a focused goal, application plan, evidence, and follow-up.

Avoid

Treating course completion as capability or offering learning without time to use it.

My notes

Team participation and belonging

Address specific collaboration needs without equating sociability or visibility with teamwork.

Prepare

- Identify the work requirement and examples.
- Consider meeting design, role clarity, safety, access, and remote participation.
- Check whether the expectation is essential.

OPEN: I want to discuss how information and participation are working on the team.

Questions to consider

- How do you prefer to contribute?
- What makes participation easier or harder?
- Are roles clear?
- What has helped elsewhere?
- What team practice should change?

CLOSE: Agree on specific behaviors and team supports.

Avoid

Labels such as 'not a team player,' forced socializing, or judging by eye contact, camera use, or talk time.

My notes

Interpersonal conflict

Address work-related conflict safely, fairly, and constructively.

Prepare

- Assess safety, power differences, harassment indicators, and whether mediation fits.
- Clarify your role and bias.
- Do not require unsafe direct confrontation.

OPEN: I want to understand the work-related impact and determine the appropriate way to address it.

Questions to consider

- What happened?
- What was the impact?
- What do you need to work effectively?
- What have you tried?
- What outcome is workable?

CLOSE: Define behavioral agreements and follow-up, or refer appropriately.

Avoid

Forcing equal blame, promising secrecy, or treating harassment as a personality conflict.

My notes

Work habits and collaboration norms

Address a recurring practice only when it affects results, safety, service, policy, access, or others.

Prepare

- Distinguish work impact from personal preference.
- Use a pattern of examples.
- Check whether the norm is clear and consistent.

OPEN: I want to discuss a recurring work practice and its impact on [result/person/process].

Questions to consider

- What contributes to the pattern?
- Was the expectation clear?
- Is there another way to meet the need?
- What change is realistic?
- What support is needed?

CLOSE: Agree on the essential outcome, flexibility, actions, and review.

Avoid

Policing harmless differences or disability-related behavior unrelated to job needs.

My notes

Attendance and availability

Clarify essential coverage or schedule expectations and address patterns through the proper process.

Prepare

- Review accurate records, policy, role needs, and prior communication.
- Apply expectations consistently.
- Know when leave, accommodation, religion, or bargaining rights require referral.

OPEN: I want to review the attendance or availability pattern and the role's coverage requirements.

Questions to consider

- Is the expectation clear?
- Is there information you want me to know?
- Do you need information about leave or another process?
- What plan can reliably meet the requirement?

CLOSE: Confirm the requirement, process, authorized plan, and follow-up.

Avoid

Demanding medical details, making assumptions, or approving leave outside your role.

My notes

Digital communication and meeting norms

Set inclusive expectations for email, messaging, video, phone, meetings, response times, records, and AI use.

Prepare

- Use policy and role needs.
- Distinguish urgent from non-urgent channels.
- Consider time zones, accessibility, focus time, privacy, and retention.

OPEN: Let us align on how this team uses each channel and what response expectations are realistic.

Questions to consider

- Which channel fits urgent, complex, or sensitive matters?
- What response times support work?
- When should chat become a call?
- What meeting practices improve access?
- What information may enter AI tools?

CLOSE: Document channel purposes, hours, response times, access, escalation, and AI/data rules.

Avoid

Expecting constant availability, requiring cameras without need, or using unapproved tools for confidential data.

My notes

Organizational change

Help employees understand what is changing, why, what is uncertain, and how to navigate.

Prepare

- Separate confirmed information from assumptions.
- Know what can be shared.
- Anticipate workload, role, access, and emotional impacts.

OPEN: I want to share what is known, what is still undecided, and how we will stay aligned.

Questions to consider

- What questions do you have?
- What impact do you anticipate?
- What is unclear?
- What support would help?
- What risks should I raise?

CLOSE: Summarize facts, open questions, support, and the next update.

Avoid

False certainty, minimizing concern, or labeling questions as resistance.

My notes

Personal concern affecting work

Respond with empathy while maintaining boundaries and focusing on workplace support.

Prepare

- Know EAP and referral pathways.
- Use a private setting.
- Pause if safety or protected leave/accommodation issues arise.

OPEN: I am sorry you are dealing with this. What would be most helpful for us to discuss about work right now?

Questions to consider

- Is there an immediate safety concern?
- What work impact should we plan for?
- Would leave, accommodation, EAP, or another resource help?
- What can I communicate to others?

CLOSE: Confirm the work plan, referral, privacy limits, and follow-up.

Avoid

Probing for intimate details, counseling beyond your role, promising secrecy, or sharing with coworkers.

My notes

Health, disability, accommodation, or leave

Recognize a possible need, protect privacy, and connect the employee with the authorized process.

Prepare

- Know the designated contact.
- Use a private setting and collect only required information.
- Do not decide whether a condition is real or eligible.

OPEN: Thank you for letting me know. I want to connect you with the right process and address immediate work needs within my role.

Questions to consider

- Are you asking for a workplace change or information about leave?
- Is there an immediate safety concern?
- May I connect you with the designated resource?
- What work information can be shared?

CLOSE: Make the referral, document only as required, maintain confidentiality, and follow approved instructions.

Avoid

Requesting diagnosis details, contacting a provider, keeping medical notes in routine files, discouraging a request, or retaliating.

My notes

Policy, ethics, harassment, or safety concern

Receive a report respectfully, protect against retaliation, preserve information, and activate the required response.

Prepare

- Know reporting channels and emergency procedures.
- Do not promise anonymity or investigate unless assigned.
- Separate immediate protection from final conclusions.

OPEN: Thank you for raising this. I am taking it seriously and will involve the appropriate resource.

Questions to consider

- Is anyone in immediate danger?
- What happened, when, and who may know more?
- Is there evidence to preserve?
- What immediate support is needed?
- How can I contact you?

CLOSE: Explain reporting, confidentiality limits, anti-retaliation, preservation, and follow-up.

Avoid

Challenging credibility, blaming the reporter, requiring legal terms, confronting the accused, promising an outcome, or delaying.

My notes

Conversation planner

Complete only what you need. For urgent or protected matters, follow the required reporting process first.

Purpose: What do I need to discuss, and why now?

Facts: What have I directly observed or verified?

Impact: Why does this matter to the work, people, policy, or safety?

Employee perspective: What do I need to ask and understand?

Outcome: What decision, clarity, behavior, support, or action is needed?

Boundaries: What is outside my authority or requires another resource?

Opening words:

Actions, owners, measures, and dates:

Follow-up date and method:

Follow-up record

Employee / Participants:

Date, time, and setting:

Purpose:

Key facts and examples discussed:

Employee perspective and relevant context:

Decisions or expectations:

Employee actions:

Manager actions and support:

Other resource or referral:

Measures or evidence of progress:

Follow-up date:

REFERENCES

Manager responsibility note and selected resources

This guide supports preparation and skill-building. It does not replace organizational policies, collective bargaining agreements, required notices, investigations, legal advice, emergency procedures, or the role of HR, Employee Relations, Compliance, Legal, Safety, Leave, Benefits, or Accommodation professionals.

Selected U.S. resources

- **U.S. Equal Employment Opportunity Commission - Harassment:** <https://www.eeoc.gov/harassment>
- **U.S. Equal Employment Opportunity Commission - Retaliation:** <https://www.eeoc.gov/retaliation>
- **U.S. Department of Labor - Family and Medical Leave Act:** <https://www.dol.gov/agencies/whd/fmla>
- **National Labor Relations Board - Concerted Activity:** <https://www.nlr.gov/about-nlr/rights-we-protect/the-law/employees/concerted-activity>
- **National Labor Relations Board - Weingarten Rights:** <https://www.nlr.gov/about-nlr/rights-we-protect/your-rights/weingarten-rights>

For managers outside the United States, use the employment, privacy, safety, leave, disability, and labor relations guidance applicable to your location (including State laws).

FINAL REMINDER: A respectful conversation can be direct. Clarity, curiosity, fairness, and follow-through are not competing goals. Strong managers practice all four.