Change Conversation Planning Tool

The Change Conversation Planning Tool is designed to help you thoughtfully prepare for leading discussions around changes within your team. Gain the clarity and strategy you need to lead meaningful discussions with purpose and positivity, towards generative change.

Welcome to the Change Conversation Planning Tool!

This toolkit is designed to support you in preparing for any tam change conversation.

Whether addressing a small change, navigating large organizational changes, or tackling sensitive topics, this planning tool provides a strategic structured approach to help you feel approach the conversation with confidence and clarity.

Use this tool to:
- Clarify the change conversation goals and desired outcomes
- Identify your values, needs and wants in this conversation
- Identify the values, needs and dynamics on your team.
- Plan a strategy to foster open dialogue and positive engagement

Leading with intention is crucial, especially in change conversations.

We hope this tool empowers you to guide your team with both compassion and confidence.

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Team Change Conversation Planning Sheet

Situation
What is a change you need to address with your team? Describe in detail.

Results
Thinking about and visualizing what we want from a conversation sets us up for success because it allows us to be present, focused on self and others and able to pivot if we need to in real time.

What is the goal for this change conversation?

How do you want people to feel at the end?

What do you want people to do after this conversation?

Context - Me
We always bring ourselves to conversations. Remembering who we are helps us in staying grounded when things feel like they are out of our control.

My personal values to remember:

Needs / Interests:

Context - Other
Who is in this conversation? Spending time thinking about who the others are, their values and interests helps us tailor our approach, questions and messages.

Values:

Needs / Interests:

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Relationship

How individuals and teams show up today is a reflection on what has happened in the past. Paying attention to this history and dynamics allows us to tailor our approach to acknowledge this while still moving forward with a change.

History

Dynamics

Organizational Context

As leaders, we work in a system. Reflecting on the work environment helps us build empathy, understanding and awareness of other things that might be impacting and influencing the change conversation we want to have.
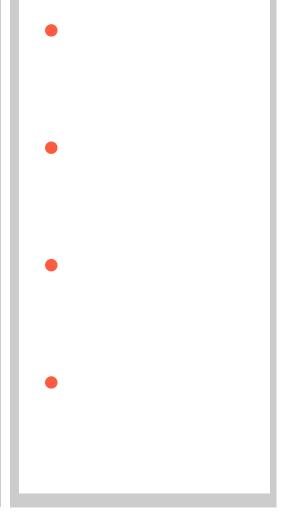
Current environment

Other Organizational Priorities

Other stakeholders

Other issues that may influence the situation

Other Factors

What else about you, the team, and/or the organization are important factors to pay attention to? List below.

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Change Conversation Key Messages & Approach

Writing down key messages helps us stay focused and ensures we hit the important points during conversations. This becomes crucial if the change conversation is challenging or goes off track. As you draft your key messages, consider:

- What key points do you need to address?
- What follow-up questions can you ask to check for understanding, clarify, and strengthen connection?

KEY MESSAGE 1	QUESTIONS

KEY MESSAGE 2	QUESTIONS

KEY MESSAGE 3	QUESTIONS

KEY MESSAGE 4	QUESTIONS

Next Steps

✉ FOLLOW UP WITH AN EMAIL

Use key points from your conversation planning tool and capture them in a follow-up email to your team. Include what you heard during the conversation—questions, concerns, or pushback—and use the email to show understanding, care, and empathy for what was shared.

💬 INVITE ONGOING DIALOGUE

Invite them to share additional thoughts, questions, or concerns. This not only shows that you value their input but also fosters a culture of trust and continuous communication.

💡 REFLECT AND ADJUST YOUR APPROACH

After the conversation, take time to reflect on what went well and what could be improved. Did the team respond as expected? Were your key messages clear? Use these insights to adjust your communication style or approach in future conversations, helping you continuously grow as a leader.

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