Begin with clarity

Take a quiet half-hour. Bring your goals and a few notes. You can leave any prompt blank.

Name: _____ Conversation date: _____

01 / My responsibilities

What am I accountable for? Which priorities or expectations need clarifying?

02 / The goals we agreed

What has moved forward? What is unfinished? What changed around the work?

03 / What matters in this conversation

Choose the one or two things you most want us to understand or decide.

Personal use. Keep completed notes private.

Contribution & initiative

Choose a few meaningful examples. Include learning and shared credit as well as outcomes.

04 / One contribution worth discussing

What was needed? What did I do? What changed? Who else contributed?

05 / What I improved between check-ins

Where did I take initiative, follow through, ask for help or test a better way?

06 / Something I am still learning

What did not go as planned? What is the context, and what would I try next?

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Talent, ambition & support

Growth can mean deeper expertise, a new responsibility or greater confidence in your current role.

07 / The direction I want to explore

What do I want from my working life? Where would I like to use more of my strengths?

08 / A next step I am willing to practise

What skill or behaviour would help? Choose something specific and realistic.

09 / The support that would make it possible

Coaching, feedback, training, time, clearer priorities or an opportunity to try?

10 / A question for my manager

What do I need to understand? What feedback would help us work better together?

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What we agree together

Complete this part in the conversation. Keep the commitments small enough to follow through.

11 / Our development priority

What are we working towards, and what would useful progress look like?

12 / My commitment

What will I try or deliver, and by when?

13 / My manager's commitment

What support or opportunity will be provided, by whom and by when?

14 / Our next check-in

Date: _____ What will we review? What evidence or learning will we bring?

Afterwards: confirm the agreed actions, use appropriate workplace storage and return to the plan when priorities change. This sheet supports reflection; use any required employer appraisal form too.

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