



NAME OF DIRECT REPORT



DATE

HOW TO USE THIS TOOL

1. Fill out your direct report's name and the date.
2. Duplicate the page as many times as needed using your preferred PDF reader, so you can track your coaching conversations over time.



GOAL

Identify the inspirational goal to drive success and keep motivation high

[Conversation Audio Sample and Checklist](#)

QUESTIONS

- What is the end goal you are working towards?
- How does this goal align with your overall purpose or values?
- What drives your desire for change?
- How will you know when you have succeeded?

NOTES



REALITY

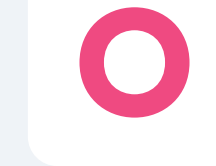
Discuss the current situation and what barriers currently exist

[Conversation Audio Sample and Checklist](#)

QUESTIONS

- What is your current status in relation to your goal?
- What actions have you taken towards your goal?
- What has been the impact of those actions?
- What are the current challenges in achieving your goal?

NOTES



OPTIONS

Explore the options for moving forward

[Conversation Audio Sample and Checklist](#)

QUESTIONS

- What potential solutions or approaches can you consider?
- How have you handled similar situations in the past?
- If there were no obstacles, what would be your preferred course of action?
- What are the pros and cons of each potential option?

NOTES



WAY FORWARD

Agree on specific actions and time frame and set accountability

[Conversation Audio Sample and Checklist](#)

QUESTIONS

- What are the specific next steps and timeline for achieving your goal?
- What resources and support do you need to move forward?
- How will you measure and track progress?
- Who will be responsible for implementing and communicating the plan?

NEXT STEPS