WORKSHEET 1 OF 4

Prepare for the conversation

Use this page to clarify your purpose and make the meeting easier to access.

Employee or meeting reference (optional)

Date

What has prompted the conversation?

Describe a specific work situation you have noticed. Keep this factual and avoid guessing at the cause.

Separate what I know from what I am assuming

What do I know?

What might I be assuming?

What would make the meeting accessible?

- [ ] Private room
- [ ] Remote meeting
- [ ] Support person
- [ ] Written agenda
- [ ] Breaks or extra time
- [ ] Other

Access request or preference to check with the employee

Three questions I could ask

1.
2.
3.

WORKSHEET 2 OF 4

Listen and understand

Capture the employee's perspective and the work barriers they want to discuss.

Listen without interruption. Allow thinking time. Check your understanding. The employee chooses what personal information to share.

What the employee wants me to understand

Where does the work feel harder? Check any areas discussed

- ☐ Tasks or workload
- ☐ Instructions or communication
- ☐ Workspace or sensory environment
- ☐ Timing, breaks or energy
- ☐ Meetings or teamwork
- ☐ Travel or access
- ☐ Changes in health or capacity
- ☐ Other

What helps already? When does work feel more manageable?

What would the employee like to happen next?

Follow-up question or point I need to clarify

WORKSHEET 3 OF 4

Explore possible support

Use this page to consider options with the employee. The best approach is individual.

The barrier we are trying to reduce

Possible areas to explore together

- [ ] Written instructions or priorities
- [ ] Workspace or environment
- [ ] Workload or task arrangements
- [ ] Support or check-ins
- [ ] Schedule or breaks
- [ ] Equipment or software
- [ ] Meeting or communication format
- [ ] Other idea

Options the employee wants to try or investigate

Option or next step	Who will check?	By when?

What should we consider before trying an option?

- [ ] Employee preference
- [ ] Practicality
- [ ] Any safety needs
- [ ] Who needs to decide?
- [ ] What interim support is possible?

Questions or information to follow up

WORKSHEET 4 OF 4

Agree actions and review

Finish with clear responsibilities, dates and a way to check whether support is helping.

A short summary of what we agreed

Action plan

Action	Owner	Target date	Done
			☐
			☐
			☐
			☐

Review the plan

Review or check-in date

How will we know whether the support is helping?

What should we do if needs change or the trial is not helping?

Information sharing

Agree what information is recorded, who needs to know it and why. Keep records proportionate and follow your organisation's privacy and record-keeping policies.

Agreed sharing or confidentiality points

Next step: confirm the agreed actions with the employee, complete the follow-up and revisit the plan together.