

LEADER PLANNER

The First *Conversation*

A planner for leaders who need to tell their team that something is changing, and want to do it with clarity, honesty, and care.

Change Navigators
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People remember *how they heard it.*

The first conversation about a change shapes everything that follows. When people hear it clearly and honestly from their own leader, they have something solid to stand on. When the message is vague, rushed, or arrives through the grapevine, they fill the gaps on their own.

Use the five prompts in this planner before you talk with your team. Write your answers in plain language, the way you would actually say them out loud.

Before you start

- [ ] I know what I am allowed to share, and what I am not.
- [ ] I know who is most affected, and I will talk with them first or soon after.
- [ ] I have chosen a setting where people can ask questions, not just listen.

1 What is changing

Describe the change in one or two plain sentences. Leave out the jargon.

> *Try: "Starting in March, we will move our scheduling to a new system."*

2 Why it is happening

What problem does this solve, and why now? Share the reason you would want to hear.

> *Try: "We are making this change because the current process is costing us time we need for patients."*

3 What stays the same

What can people count on? Naming what is not changing lowers anxiety fast.

> *Try: "Your team, your manager, and your core responsibilities are not changing."*

4 What we do not know yet

Be honest about open questions, and say when you expect to have answers.

> *Try: "I do not have the answer on that yet. I expect to know by the end of the month, and I will tell you as soon as I do."*

5 What happens next

Share next steps, the timeline, and exactly how people can raise questions or concerns.

> *Try: "Over the next two weeks, you will get training dates. Bring questions to me directly or to our Thursday check-in."*

In the room

- [ ] Say the change plainly before you soften it.
- [ ] Pause and invite questions. Then wait.
- [ ] Acknowledge feelings without debating them.
- [ ] Do not promise what you cannot control.

After the conversation

- [ ] Follow up with the team within a week.
- [ ] Meet one-on-one with the people most affected.
- [ ] Share answers to open questions as they come.
- [ ] Watch for signs of fatigue, not just resistance.

WHAT TO DO NEXT

Help your leaders *practice this.*

A planner helps one conversation go better. Practice helps every conversation go better. In the Leading People Through Change workshop, leaders rehearse the conversations change requires, from the first announcement to the moment someone pushes back.

Leading Through Change	Workshops, keynotes, and cohort modules that build the leadership side of change. **changenavigatorsglobal.com/leading-through-change**
Take the free Leader Snapshot	Fifteen statements, about five minutes. See where your leadership bench is strong and where to focus first. **changenavigatorsglobal.com/leader-snapshot**
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Every workshop includes a signature kit, so the learning goes back to work with your people.

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