

Structured Conversation Templates for HR

Purpose:

Provide HR professionals with a guided approach to discuss workplace concerns with employees while maintaining objectivity, confidentiality, and compliance.

1. Performance Concern Conversation

Objective: Address declining productivity or performance issues while identifying support needs.

Template:

1. Greeting & Purpose

- “Hi [Employee Name], thank you for meeting with me. I want to discuss some recent observations regarding your work performance and see how we can support you.”

2. Observation & Impact

- “I’ve noticed [specific behavior/performance issue] over the past [timeframe]. This has impacted [team/project/outcome].”

3. Employee Response

- “Can you share your perspective on what might be contributing to this?”

4. Support & Resources

- “We want to support you. Options include EAP, flexible scheduling, or other resources. How can we help you address this?”

5. Next Steps & Follow-Up

- “Let’s agree on concrete steps and a timeline. We’ll check in on [date] to review progress.”

2. Safety or Incident Conversation

Objective: Address an incident or safety concern objectively.

Template:

1. Greeting & Purpose

- “Thank you for meeting. We need to discuss an incident that occurred on [date].”

2. Incident Description

- “The following was observed: [brief, factual summary].”

3. Employee Response

- “Can you explain what happened from your perspective?”

4. Policy Reminder & Support

- “Our policies are in place to ensure safety and compliance. We also want to ensure you have support if there are underlying challenges.”

5. Action Plan

- “Based on this discussion, here’s what we’ll do next: [corrective action, training, support, etc.].”
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3. Referral / Treatment Conversation

Objective: Address concerns about potential substance use and guide employee toward treatment.

Template:

1. Greeting & Purpose

- “Hi [Employee Name], I want to discuss some observations that concern your safety and performance and review available support.”

2. Observation & Impact

- “We’ve observed [specific behavior] that affects workplace safety or performance.”

3. Employee Response

- “Can you help me understand what might be contributing to this?”

4. Support & Resources

- “We want to provide support, including confidential access to EAP or direct referral to a treatment provider like Bridging the Gaps. This is a confidential process designed to help you.”

5. Next Steps & Follow-Up

- “We’ll provide guidance on leave, treatment options, and a plan for returning to work. Let’s set a follow-up date to review progress.”

Tips for HR:

- Always stay factual, avoid assumptions, and maintain neutrality.
- Document the conversation afterward.
- Keep the discussion private and confidential.
- Emphasize support and resources rather than punishment.
- Prepare any necessary paperwork in advance (FMLA, STD forms, referrals).