hellomonday

# SAID planning template

**Instructions:** Use this template to plan a conversation about performance or behaviour that needs to change. Have the conversation in private, and as soon as you can after the issue.

### Opening line

Tell the person why you are raising it. For example: "I'd like to talk about [the situation]. I'm raising it because I want this to go well for you, and I think it's something you can change."

### Situation/Standard

Describe the situation or the standard expected, so the person has something to compare their performance against.

### Action

Describe the behaviour or action you observed. Stick to what you saw or heard.

### Impact

Describe the impact it had on the customer, the team or the work.

### Do/Develop

What could they build on or do differently? Ask for their view first ("How do you see it?"), then agree this together.

### When they react...

If they are surprised, defensive or upset, respond to the feeling before you go back to the issue:

1. **Acknowledge it.**
   "I can see this is frustrating to hear."
2. **Stay away from judgment.**
   Don't tell them how they should feel, or argue with their reaction.
3. **Avoid "at least".**
   It makes the impact of your feedback smaller rather than acknowledging the issue.
4. **Keep in line with the message.**
   Once they feel heard, return to the issue.

### Agree what happens next

Agree the Do/Develop step together and set a date to check in.

For example: "So from [date] you'll [action]. Let's check in on [date] to see how it's going."

1. **Agreed action**

2. **Check-in date:**

### My plan for our next check-in

Fill in the blanks. When I meet [name] on [day], I'll open with [opening line] and [recap the issue] using SAID.

Then, to follow up on their progress, I'll ask...

If the issue is serious misconduct, or has been raised before without change, follow your organisation's formal process instead.