

## BEELINE COACHING

Clarity | Focus | Strategy

**Accountability Preparation Worksheet:** In a recent newsletter I touched on these 11 steps towards holding Accountability. See below for next steps to aid in your preparation for this process:

1) **Respectfully and with kindness:** In accountability, a well thought out conversation goes a long way. Respect and kindness for yourself and toward the person you are holding accountable, will more often help you to make the point in a meaningful way that the person can hear it.

Next Step: Think through the conversation and write out each step. This will help you to gain clarity and focus on what is important while developing a strategy for the conversation.

2) **Timely:** It is best to bring it up when the infraction has occurred, don't let too much time pass

Next Step: Make a date to talk through your concerns and the next steps

3) **Be clear and state the facts.** This is not the time to rant or to be passive aggressive. This is time to take an observer view and just state the facts of what happened.

Next Steps: Think through what happened, write out each fact one by one as if you were someone watching what happened.

4) **Be honest:** What were you expecting them to do? What did you need them to do? What had they agreed they would do? State these.

**Next Steps:** Get real here, what were you expecting? What did you have in your mind they were to do? Does this match up with what you needed them to do? Where does what they did differ from what you needed or expected? Write this out

5) **Shine a light on the gap:** Share with them the differences between what they did or didn't do and what you expected

**Next Steps:** Write out the exact differences between what they did and what you were expecting. Try writing in two columns. One what they did Second what I expected

6) **Share the consequences:** What happened as a result of what they did or didn't do? What is the impact on you personally, your organization, your relationship?

**Next Steps:** When there is a difference in what we needed or expected and what happened there are things that happen as a consequence. Write these out. What were the consequences? What happened? What was the impact on you? What was the impact on your organization?

7) **Ask for their feedback:** At this point you may want to hear their side of the story.

**Next steps:** Write out what you believe they will say. Write out what you believe are the reasons they have done what they did. This is powerful. This is where you can work through any of your own ideas, misconceptions, and anger. Writing it out is helpful for you to have a better understanding of how you are feeling and why it was so upsetting.

When you are in the real conversation this is the point where you simply listen to them all the way through without judgement.

8) **Consequences and Moving Forward Plan:** After you hear their side, it is now time to decide what to do next. This is the part where you will have to decide the consequences and for you to state them and the plan for moving forward

**Next steps:** Write out what you feel the best plan is for consequences and what you hope will happen with these consequences.

9) **Expectations:** Clearly outline and state your expectations for what you expect from them moving forward. This includes what you want them to do and anything you expect from them.

**Next steps:** Write out an actual outline and your expectations. This will help you to think it all the way through and to check in on yourself.

10) **The Plan:** Make a follow up plan and stick to it with specific steps and deadlines

**Next steps:** write out the follow up plan and how you will stick with it along with the deadlines

11) **Follow up according to plan**

**Next steps:** *Stick to your schedule. Perhaps write out a mantra for yourself to help follow through.... Something like: "This plan is important. I need to follow through. It is best for us all"*

**Note:** *Beeline Coaching realizes these steps may not be entirely useful to you or your situation. We trust you will use what works and find your way with the rest or let's connect to discuss.*