CONVERSATION FRAMEWORK CHEAT SHEET

Client Name + Contact		Client Code	
Date		Est. time	

Purpose of this document
1. Have a clear framework and structure to have efficient and effective conversations
2. Easily capture information from conversations when appropriate
3. Ensure clarity and next steps

Your steps	Notes
CONVERSATION PREP What is the purpose?	
What does success look like?	
How long is it going to take?	
List 1-2 things to ask, to stimulate the conversation	
CONVERSATION NOTES *Firstly, ask permission to have the conversation, i.e. "Do you have X minutes now? Can we discuss XYZ? I would like to achieve…."*	
NEXT STEPS *"I hope you find this valuable. I'll drop you an email to summarise our conversation and next steps…."*	

Arising Actions			
Action #	Action	By Who	By When
1			
2			
3			

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Questions	Notes
WHEN THE CLIENT INITIATES THE QUERY What is their purpose?	
What does success look like to them? What do they want to achieve?	
ASK: "How long are you expecting it to take?"	
CONVERSATION NOTES *If the issue appears to be more complex, ask to schedule a suitable time with the client to create the space to deep dive. Then return to these notes.*	
NEXT STEPS *"I hope you find this valuable. I'll drop you an email to summarise our conversation and next steps…."*	

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