

The Role Reset Conversation

FOR WHEN AN EMPLOYEE MAY NEED TO CHANGE, GROW, OR EXIT.





When an employee isn't meeting expectations, leaders often jump straight to termination — or avoid the issue entirely. The Role Reset Conversation is a middle ground.

It's your chance to explore whether the employee can grow into what's needed... or if it's time to part ways.

These prompts guide you through the conversation step-by-step, balancing clarity, compassion, and compliance.

⚠️ Pro Tip: Never have this conversation alone. Always include an HR representative or a second leader to support documentation and ensure fairness.

THE ROLE RESET CONVERSATION FRAMEWORK



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Step 1: Set the Stage

Goal: Create safety while naming the need for change.

Script Starter:

"I wanted to talk about how your role has evolved and how we can make sure it's still the right fit — both for you and the organization."

Prompts:

- *What's working well in the current role?*
- *What challenges have come up recently?*
- *How has the role or business changed since you started?*



Step 2: Define the Gap

Goal: Identify where expectations and performance diverge.

Script Starter:

"Here's what's been expected in this role, and here's what we're currently seeing. I want to make sure we're aligned on where the gaps are."

Prompts:

- *Be specific — what results or behaviors are missing?*
- *What impact is this having on the team or business?*
- *How clear have expectations been to this point?*



Step 3: Explore Options

Goal: Decide whether this is a development opportunity or a potential exit.

Script Starter:

There are a few ways we could move forward. One is focusing on growth and development in this role. The other is recognizing it may no longer be the right fit."

Prompts:

- Does the employee show interest and capacity to grow?
- Are the performance issues skill-based, will-based, or structural?
- What timeline feels realistic for change?

EXAMPLE RECRUITMENT EMAILS



Step 4: Co-Create a Plan (or Transition)

Goal: Align on next steps — either a development plan or a graceful exit.

Script Starter:

"Let's outline what the next few weeks look like so we both have clarity."

Prompts for Growth Path:

- *What does success look like in 30–60 days?*
- *How will we check in and measure progress?*

Prompts for Exit Path:

- *How can we make this transition as smooth and respectful as possible?*
- *What support or resources could help them land well elsewhere?*

EXAMPLE RECRUITMENT EMAILS



Step 5: Follow Up and Document

Goal: Protect the employee, the leader, and the business through clarity.

Script Starter:

"I'll summarize what we discussed today and send it over for us both to confirm. That way we're on the same page moving forward."

Prompts:

- *Capture agreements and timelines in writing.*
- *Schedule a follow-up meeting within 2–3 weeks.*
- *Keep HR involved at every step.*