

PEOPLE PRACTICE GUIDE

Grievance conversation starter pack

A calm, practical checklist for opening meetings, fair documentation and clear next-step options.

GUIDE

September 2026

How to use it

Work through the prompts in order, record only what is needed, and adapt the steps to your policy, the facts and the people involved.

This document is a general guide and practical aid only. It is not legal advice and should not be relied on as a substitute for advice about a specific situation. Check current law, official guidance, contracts, policies and collective arrangements before acting.

1. Before the opening meeting

Start with the process, not a conclusion

- ☐ Read the grievance in full and identify each concern without deciding whether it is proven.
- ☐ Check the grievance procedure, relevant policies, contractual terms and any agreed timescales.
- ☐ Choose an impartial meeting chair. If the named contact is involved, appoint an appropriate alternative.
- ☐ Confirm the meeting purpose, practical arrangements and the employee's right to be accompanied where applicable.
- ☐ Ask about adjustments, accessibility, language or wellbeing needs. Include anyone absent from work in communications.
- ☐ Secure the documents. Share personal information only with people who need it for the process.
- ☐ Consider immediate risk controls without prejudging the grievance: safety, working relationships, evidence preservation or temporary reporting arrangements.

Kindred pause point

If the complaint involves discrimination, harassment, whistleblowing, safeguarding, health and safety, criminal allegations, senior leaders or possible dismissal, take advice before fixing the route.

Invitation essentials

- Date, time, place or video link
- Who will attend and their role
- Purpose and broad scope
- How to request adjustments
- Companion arrangements
- Relevant policy and documents
- What happens after the meeting

2. Open the conversation well

A useful opening

Suggested wording

Thank you for meeting with me. I want to understand your concerns properly and make sure we follow a fair process. I have not reached any conclusions. I will ask questions, check my understanding and explain what happens next. If you need a break or adjustment, please say.

Questions that create clarity

- Please talk me through what happened, in your own words.
- What are the separate issues you would like us to address?
- When and where did each event happen, and who was present?
- What documents, messages or other information may help us understand?
- Who else may have relevant first-hand information?
- What impact has this had on you or your work?
- Have you already tried to resolve any part of this? What happened?
- What outcome are you hoping for? Is there anything that would help immediately?
- Is there anything you are worried may happen because you raised this?
- What have I not asked that you think matters?

Meeting habits

- ☐ Use open questions first, then precise follow-ups.
- ☐ Separate facts, impact, interpretation and requested outcome.
- ☐ Avoid promises about confidentiality or outcome that cannot be kept.
- ☐ Summarise each issue and ask the employee to correct anything misunderstood.
- ☐ Adjourn if new information changes the scope or creates an urgent risk.

3. Record what matters

A clean note is factual, proportionate and useful

Record	Good practice	Avoid
Issue	Separate numbered concerns in neutral language.	Combining everything into one vague allegation.
Evidence	Note what was said, source, date and any document to obtain.	Writing opinion as fact or copying unnecessary personal detail.
Response	Capture the employee's account, corrections and requested outcome.	Selective notes that omit important context.
Process	Record attendees, breaks, companion input, adjustments and next steps.	Secret recordings, unclear ownership or missing timescales.
Handling	Store securely and retain in line with policy and data-protection duties.	Wide circulation or indefinite local copies.

Meeting details: date / time / location / chair / note-taker / employee / companion

Concerns raised - number each issue and note the employee's words where they are important

Evidence or people identified - include where the information can be found

4. Choose and explain the next step

The right route depends on the concern, the policy and what a fair process requires.

Possible route	When it may fit	What to make clear
Informal resolution	The employee agrees; risk is manageable; the concern may be resolved promptly.	Voluntary nature, action owner, review date and option to return to formal process.
Formal investigation	Facts are disputed, serious, complex or need evidence from others.	Scope, investigator, expected contact, confidentiality limits and indicative timing.
Mediation or facilitated discussion	Relationship issues may benefit and participation is genuinely voluntary.	It is not a substitute for investigating allegations that require findings.
Immediate safeguarding / specialist route	Safety, regulatory, criminal, whistleblowing or protected disclosure issues arise.	Who is taking control, immediate protections and how the employee will be updated.
No further action on a point	The issue is outside scope, already resolved, unsupported after fair review, or another route applies.	Reasoned explanation, any remaining action and appeal process.

During disciplinary action

A grievance raised during a disciplinary process may justify a pause, or the issues may be handled together where they are related. Check the policy and decide fairly rather than applying an automatic rule.

Close the meeting

- ☐ Summarise the concerns and check accuracy.
- ☐ Explain the likely route without promising a result.
- ☐ Confirm any immediate support or temporary arrangements.
- ☐ Give an update date, even if the final timetable is not yet known.
- ☐ Explain how questions can be raised and how the eventual decision may be appealed.

5. Action and update record

Agreed immediate actions / support / adjustments

Investigation scope or informal resolution steps

Action owner(s) and target dates

Next update to employee - date, method and person responsible

Open questions / advice required

Before sending notes

Check tone, accuracy, relevance, names, dates, confidentiality markings and whether the employee should be invited to comment on the factual record.

Sources and use note

Content checked against the following official guidance on 6 September 2026:

- [GOV.UK - Handling an employee's grievance](#)
- [Acas - Grievance procedure step by step](#)
- [Acas Code of Practice on disciplinary and grievance procedures](#)

Legal and professional-use notice

This resource is general information and a practical management aid only. It is not legal advice, does not establish an adviser-client relationship and cannot account for every contractual, regulatory or factual circumstance. Apply current law and your own policies, and obtain appropriate HR or legal advice before taking action. Kindred HR (NW) Ltd does not accept responsibility for decisions made solely in reliance on this guide.

Kindred HR NW supports organisations with practical people advice, policy review, manager capability and employee-relations processes.