

FEEDBACK PLANNING WORKSHEET

Instructions: Preparation is key to effective feedback discussions. Use the following questions, reminders and tips to help prepare for your discussions. As you gain experience, the issues/questions on this worksheet will become second nature for you.

Reminder:

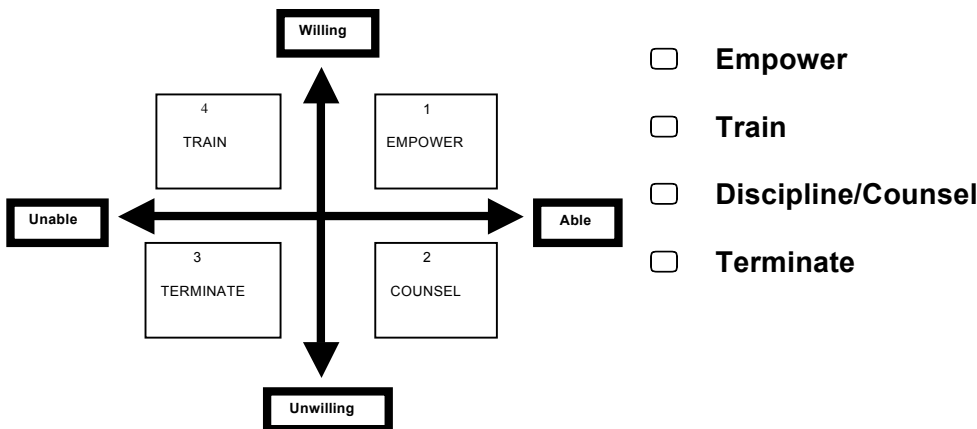
The SIX KEY Components:
Focused on Behavior, Timely, Candid, Specific, Brief, Business Rationale

The Feedback Process:
Observe, Classify the Situation, Prepare, Engage, Manage the Conversation, Create Follow-Up

1. Observe: What are the specific behavioral examples that you have observed? What is the impact of the behavior/action to important business needs or challenges?

Behavioral Observations:	Business Impact of Behavior:

2. Classify/Approach: What type of feedback situation is this?



3. Why are you providing this feedback?_What is it that you want to see changed as a result of this feedback?

4. Engage: What is your opening statement/conversation starter? REMEMBER: be brief, try not to “sandwich” and politely and professionally get to the point. For constructive feedback, maintaining a level inflection to your voice is helpful. REMEMBER! MANAGE YOUR FACE, BODY, TONE, WORDS.

5. Actions: What is that the individual can/will do to improve/strengthen behavior? (Remember, ideally you want to develop the action plan together.) Clarify the “What?” “Why?” and “When” and don’t assume that the receiver understands the “How?” Ensure clarity between all parties.

6. Follow-Up: (Don’t wait until the end of the time frame to connect. Frequent follow-up creates accountability and provides more coaching opportunities.)

Follow-Up Dates & Expectations:

7. Other considerations:

<ul style="list-style-type: none">• Meeting Time	<ul style="list-style-type: none">• Documentation
<ul style="list-style-type: none">• Meeting Location	<ul style="list-style-type: none">• Involvement of Manager or Human Resources