

EFFECTIVE FEEDBACK PLANNING WORKSHEET

Type of Feedback: ☐ Opportunity for Growth ☐ Appreciation

Step 1: The correct time and place

- ☐ How do you extend the invitation or ask for permission to share feedback?
- ☐ When?
- ☐ Where?

Step 2: Objective Observation

Write the facts that you have directly observed, using first person voice, without evaluation or interpretation:

Questions to verify:

- ☐ "Were/are you aware that...?"
- ☐ "Have you noticed something similar?"
- ☐ "Have you observed the same thing?"

Useful phrases:

- I have noticed ...
- I hear you saying ...
- I observe/note that...
- According to the information that I have ...
- From my point of view,...

Be careful with:

- Always/never
- Too...
- Very
- Good/bad
- Slow/fast
- ...other adjectives or adverbs
- Future predictions

Step 3: The effect

Write the effect that you think the other person's conduct has on his or her performance, or on the performance of others:

Questions to verify:

- ☐ "Were/are you aware that...?"
- ☐ "Would you explain these results in the same way?"
- ☐ "Have you noticed something similar?"

Helpful phrases:

- "I've noticed..."
- "I've observed..."
- "The information that you are telling me seems to say..."
- "In my view, it seems that ..."

If there is an inevitable subjective element:

- "I believe that as a consequence..."
- "As it turns out, I think..."
- "I am assuming that the effect of this will be..."

Step 4: Optional: Use your emotions (carefully)

Write this phrase to share:

... and I am _____ because I/we had the hope/expectation that....:

The emotion that this situation leaves me feeling is:

- ☐ Happy/pleased
- ☐ Relaxed/calm/comfortable
- ☐ Worried
- ☐ Disappointed
- ☐ Angry/upset
- ☐ Frustrated

Step 5: State values and/or needs

Is a personal or professional value or need relevant here?

Write your statement of value or need, and the positive effect you think it would have if respected:

Examples of needs:

- Autonomy or freedom to make decisions
- Space
- Inclusion
- Physical and emotional safety
- Harmony
- Order
- Inspiration
- Acceptance
- Recognition
- Help/support
- Understanding/consideration
- Community
- Confidence
- Empathy
- Honesty

Step 6: Close with clarity

Questions to open dialog:

- ☐ What would you do differently?
- ☐ What do you propose?
- ☐ What resources do you need?
- ☐ Are you prepared/willing to?
- ☐ How do you imagine doing...?
- ☐ May I give you a suggestion/a piece of advice?

A request:

- ☐ Direct
- ☐ Realistic
- ☐ Tangible results required, and applicable standards.
- ☐ The reason "why"
- ☐ The recipient has the authority to comply

A limit:

- ☐ Only set a limit that the recipient is ready to comply with
- ☐ Natural consequences
- ☐ A just, systematic mechanism is in place to extend consequences

Agreements:

- ☐ What elements are you willing to negotiate?
- ☐ What are you NOT willing to negotiate?

Final reflection:

- ☐ Was the conversation useful in clarifying the situation?
- ☐ Was the conversation productive for you?
- ☐ For you, what was the most helpful aspect of this conversation?
- ☐ Which was the most helpful idea proposed?
- ☐ How could I have had a more productive conversation?
- ☐ What changes would I like to make for next time?