

GIVING JOB PERFORMANCE FEEDBACK
CHECKLIST for *KARVY FINANCIAL SERVICES LTD*

☐ **Step 1. Get to the point**

- ☐ The purpose for this meeting is...
- ☐ I asked you here to discuss....
- ☐ I want to spend some time discussing how you...

☐ **Step 2. State why you are having this conversation**

- ☐ I have a concern about...
- ☐ A problem has occurred in...

☐ **Step 3. Describe what you know**

- ☐ I saw...
- ☐ When I was told, I looked into the issue by...

☐ **Step 4. Describe the consequences of the continued behavior**

- ☐ If this continues, then ...
- ☐ In looking at this situation as a customer would, it appears...

☐ **Step 5. Describe how you feel about what you know**

- ☐ I am very concerned about...
- ☐ I do not think it is right that...
- ☐ I am upset that errors in the function keep occurring...

☐ **Step 6. Encourage the other party to give their side of the story**

- ☐ Now, that's what I know but what is your view...
- ☐ Is that the way you saw it...
- ☐ OK, now what is your reaction?

☐ **Step 7. Ask as many questions as you need to understand the situation from the other person's perspective.**

☐ Well, how do you know that...

☐ And then what happened?

☐ If you did that, then why did...

☐ **Step 8. Decide what specific actions must be done, when and communicate that to the other party**

☐ I believe you must...

☐ In the next meeting, as Point 4 in the agenda, you will...

☐ **Step 9. Summarize the conversation**

☐ Let's recap, you will... and I will...

☐ **Step 10. Follow up**

☐ I will contact you next...