

FEEDBACK PLANNER

Employee Name:		Supervisor Name:	
Loc/ Dept/ Job Title:		Supervisor Job Title:	
Meeting Date & Time:		Witness Name (if applicable):	

The purpose of this planner is to help you structure your thoughts in preparation for providing feedback. The actual feedback should be given verbally and not by means of passing this worksheet to the employee.

MEETING POINTS (*Situation-Behavior-Impact-Questions-Dialogue*)

1. What was the specific **Situation/Task** in which the person was involved?

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2. What specific **Behavior/Action** did you observe the person take in that situation/task? How will you describe what the person said or did? Or what did he/she/they NOT do or NOT say (which should have been said or done)? (*Avoid assumptions; try to not write down what you think they were thinking or what motivation was involved – state the action as if you were watching a movie – what was actually said and done only.*)

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3. What was the specific **Result** of the person's action or communication (or lack thereof)? How will you describe it? What was the **Impact**?

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4. What **HOW** and/or **WHAT Questions** will you ask to understand the employee's reasoning/motives/objectives for the action or communication? (*Avoid WHY questions.*)

5. What would you like the person to say or do in situations like that? (In case he/she/they did NOT do what you expected.) *(If the person did do or say the right thing, be sure to recognize him/her/them for that.)*

6. What follow-up action or check-in do you want to propose to the employee given the feedback you propose to give? (If applicable)

PREPARATION FOR THE MEETING

1. When and where will you give this feedback? *(Remember, feedback must be close to the time you observed the behavior to be effective and avoid surprises at the annual performance appraisal or other scheduled feedback sessions.)*

2. What will you say to get the **Micro-Yes**?

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3. What will you say to open the discussion with the person? How will you start?

4. How do you think the person will react to this feedback? What do you think he/she/they would do or say when you provide this feedback?

5. What questions do you anticipate the employee to have? What will your answers be?