Feedback Conversation Planner

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Feedback is one of the most powerful tools for growth, both personally and professionally. When done right, it strengthens relationships, builds trust, and inspires meaningful improvement. But delivering feedback effectively—especially when it's constructive or challenging—requires preparation. A well-planned feedback conversation ensures clarity, minimizes misunderstandings, and creates a supportive environment where both parties can thrive. Taking the time to prepare not only helps you communicate more effectively but also demonstrates respect for the recipient, setting the stage for a productive and impactful dialogue.

Use this planner to prepare for a structured and constructive feedback conversation. Select a feedback model that aligns with your objective and follow the prompts below to organize your key points.

Define the Purpose and Focus:

Before jumping into the details, clarify your goals for the conversation. This will help you stay focused and ensure the feedback is constructive.

- **Objective of Feedback**: What is the purpose of your feedback? Be clear about what you want to achieve.
  - *Example*: "To help [Name] improve their time management to meet project deadlines more effectively."

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- **Type of Feedback**: Identify whether the feedback is:
  - **Positive**: Reinforce behaviors or actions you want to see repeated.
  - **Constructive**: Address specific areas for improvement.
  - **Developmental**: Focus on broader growth opportunities or skills.

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Pro Tip: Reflect on your intention to ensure your feedback supports the recipient's success.

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<u>**Choose Your Feedback Model**</u>:

Select the feedback model that aligns best with your goal and situation. Each model offers a unique structure for delivering effective feedback.

- **SBI (Situation-Behavior-Impact)**
  A straightforward model where you describe the specific situation, the observed behavior, and the impact of that behavior. This is ideal for quick, clear, and actionable feedback that focuses on observable facts rather than assumptions.
  - *Example Use*: Addressing a specific behavior that occurred in a meeting or project.

- **IDEA (Introduce-Describe-Explain-Action)**
  A structured approach to feedback. Start by introducing the topic, describe the observed behavior, explain its impact, and suggest actionable steps. This method works well for conversations that require a clear path forward.
  - *Example Use*: Providing constructive feedback with an emphasis on solutions.

- **STAR (Situation-Task-Action-Result)**
  Used for reinforcing positive behaviors or analyzing specific events. Outline the situation, the task or goal, the action taken, and the result achieved. This model is particularly effective for recognizing success and identifying lessons learned.
  - *Example Use*: Reviewing the outcome of a project or recognizing exceptional performance.

- **Pendleton Model**
  A collaborative feedback approach that encourages dialogue. Start by asking the recipient to identify what went well, then share your perspective on strengths and areas for improvement, and finish by agreeing on actionable next steps. This is ideal for balanced, two-way conversations.
  - *Example Use*: Developing team members by focusing on both strengths and growth areas.

- **CEDAR (Context-Examples-Diagnosis-Action-Review)**
  This model provides a deeper framework for developmental feedback. Begin by setting the context, provide specific examples, diagnose the underlying issues, suggest actionable steps, and review progress. It's particularly useful for addressing recurring challenges or performance issues.
  - *Example Use*: Coaching a team member through a complex or long-term development area.

- **BOOST (Balanced-Observed-Objective-Specific-Timely)**
  Ensures feedback is concise and actionable by balancing positive and constructive elements, basing it on observed behavior, keeping it objective, and delivering it in a timely manner.
  - *Example Use*: Delivering quick feedback during one-on-one check-ins or performance reviews.

- **DESC (Describe-Express-Suggest-Consequences)**
  Designed for addressing difficult behaviors. Describe the situation, express your concerns, suggest alternatives, and outline potential consequences. This model is especially effective for conversations requiring a firm but respectful approach.
  - *Example Use*: Addressing conflicts or behaviors impacting team dynamics.

- **Feedback Sandwich**
  Start with positive feedback, discuss areas for improvement, and close with more positive reinforcement. While it helps reduce defensiveness, it's best used sparingly to avoid diluting the message.
  - *Example Use*: Delivering feedback in less formal settings or with sensitive individuals.

Instructions: Review the descriptions above and select the model that aligns best with your feedback goal. Tailor your preparation to match the structure of your chosen model.

Feedback Model: _____

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Prepare Key Points (Based on Your Chosen Model):

Use the following prompts to outline your feedback. Tailor your responses to the model you've chosen.

- **Situation or Context: Provide a clear and objective description of the event or scenario.**
    - *Example*: "In last week's team meeting, I noticed…"

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        _____

- **Behavior or Actions:** Identify specific behaviors or actions you observed.
    - *Example*: "You took the lead on presenting the project timeline…"

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- **Impact or Outcome:** Explain the result or effect of the behavior on the team, project, or organization.
    - *Example*: "This helped clarify roles for the team and ensured alignment on deadlines."

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- **Suggested Actions or Alternatives:** Outline potential next steps or solutions to discuss.
    - *Example*: "Next time, let's aim to prepare a backup plan for unanticipated delays."

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Pro Tip: Stay factual and avoid assumptions. Stick to what you observed.

Checklist for Conversation Readiness:

Set yourself up for success by ensuring you're fully prepared.

- **Mindset Check:** Are you calm, open, and solution-focused? Take a moment to center yourself and focus on creating a constructive dialogue.
- **Timing:** Is the feedback timely and relevant? Deliver feedback as soon as possible while the context is fresh.
- **Tone and Language:** Have you considered how your tone will come across? Ensure your language is respectful, clear, and aligned with your objective.
- **Setting:** Have you chosen the right environment? Feedback should be delivered in a private, distraction-free space.

Pro Tip: The recipient is more likely to respond well if they feel respected and supported.

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Engaging the Recipient:

The way you start the conversation and engage the recipient sets the tone for the entire discussion.

- **Opening Questions**: Use open-ended questions to encourage dialogue and show that you value their perspective.
  - *Examples:* "How do you feel about [specific project or situation]?" or "What do you think went well?"

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- **Acknowledging Emotions**: Be prepared to listen actively and acknowledge emotional responses.
  - *Example*: "I understand this feedback might feel difficult, and I appreciate your openness to discussing it."

Pro Tip: Create a safe, collaborative space by inviting the recipient to share their thoughts early in the conversation.

Post-Conversation Follow-Up:

Feedback doesn't end with the conversation—following up reinforces growth and shows your commitment to the recipient's success.

- **Next Steps Agreed Upon**: Document the actions both parties agreed to during the discussion.
  - *Example*: "We agreed to implement weekly check-ins to track progress."

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- **Follow-Up Plan**: Schedule a check-in to review progress and provide additional support.
  - *Example*: "Let's touch base in two weeks to see how the new process is working."

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- **Self-Reflection**: After the conversation, take time to reflect on what went well and what you might improve for future feedback sessions.
  - *Example*: "Next time, I'll use more examples to clarify the impact of specific actions."

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Pro Tip: Regular follow-ups ensure feedback has a lasting impact and helps maintain accountability.

Final Note:

Effective feedback takes preparation, practice, and empathy. Use this planner as your guide to creating feedback conversations that are clear, constructive, and action-oriented. Pair it with the feedback model that fits your situation, and you'll set yourself up for success.