

# Discussion Planner

**Discussion with:**

**Date:**

Why are you providing the feedback? What observations do you have to support the feedback?

What would you like the outcome of the discussion to be? What are the main objective(s)?

Have you considered the personal needs, tendencies and/or characteristics of this person in preparing for this discussion?

Identify the situation using opportunities and challenges you wish to discuss:

| Opportunities | Challenges |
|---------------|------------|
|               |            |

| Checking For Readiness   | Specific Examples                                      |
|--|--|
| <input type="checkbox"/> Ready to receive<br><input type="checkbox"/> Created appropriate space<br><input type="checkbox"/> Reviewed the principles and tips of feedback<br><input type="checkbox"/> Intent is clear | Identify examples to support your feedback discussion: |

## Discussion Guidelines

### 1. Establish the Focus/Specific & Descriptive

- State the purpose of the discussion
- Clearly identify what behaviors have been observed
- Use descriptive words & I statements
- Identify impact of behavior

Check for understanding

### 2. Clarify/Exploration

- Ask open ended questions to gain the employee's perspective
- Identify any issues using open ended questions
- Check for understanding
- Acknowledge feelings

Check for understanding

Offer Suggestions

### 3. Coach to a Solution

- Ask open ended questions to seek and discuss ideas
- Try to present a different frame of reference
- Keep an open mind
- Discuss challenges to solutions

- Check for understanding
- Offer Suggestions

### 4. Confirm Commitment to the Solution

- Summarize what was established
- Commit to a solution

- Check for understanding
- Offer Suggestions

### 5. Close the Discussion

- Review the conclusion of the discussion
- Reemphasize the desire to work collaboratively
- Thank the receiver for their time
- Identify follow-up time

- Check for understanding

| <b>Ongoing Support – Actions we agreed to</b> |                  |
|---|------------------|
| <b>Person</b>                                 | <b>Me/Others</b> |
|   |                  |

**Reflecting on Discussion**

What worked well in this discussion?

How could this discussion have been more effective?

What principle of feedback should I focus on for the next follow-up meeting?