

**Feedback in 15 Sample Template for Leaders**

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| Employee: Sally Smith | Session No. 4 of 12 |
| Leader: Bob Blakely | Date & Time: 10/23/20 10:00 to 10:15 a.m. |
| Employee’s overall goal: to become a successful new manager |
| AgendaEmployee’s agenda: How to get John to do what he’s supposed to doLeader’s agenda: Help Sally realize relationships change when you become a manager |

NOTES

*In this example, the leader decides to use Sally’s agenda as an example for teaching the new manager that relationships often need to change when one moves into management. This is frequently a problem for new managers.*

*The leader could share his own examples and refer Sally to resources to learn more about managing people and how to adjust her thinking. He could send her to a training program. He could also have Sally take the EQ-I, which assesses her own emotional intelligence. From those results, Sally and her leader could build a plan for Sally to increase her ability to manage herself and others.*

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| Outcomes Sally gains new insights into what it means to be a manager. | Skills that apply Managing one’s self; managing others |
| Action ItemsEmployee: Sally commits to studying the resources the leader provides.Leader: Send Sally links to learn more. | Next MeetingDate:Time:Location: |



**Feedback in 15 Template for Leaders**

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| Employee:  | Session No. \_\_\_\_ of \_\_\_\_ |
| Leader:  | Date & Time: mm/dd/yr X:00 to X:00 |
| Employee’s overall goal: to become a successful new manager |
| AgendaEmployee’s agenda: Leader’s agenda:  |

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| Outcomes  | Skills that apply  |
| Action ItemsEmployee: Leader:  | Next MeetingDate:Time:Location: |



**Feedback Planning Sheet Sample for Employees**

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| --- | --- |
| Employee: Sally Smith | Session No. 4 of 12 |
| Leader:   Bob Blakely | Date & Time:  3/23/16     10:00 to 10:15 a.m. |

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| My top issue to share with my leader: I’m struggling with how to manage John on the Acme project. John is not meeting deadlines and doesn’t share information with me that he should. | Consider: This should be your top concern as of today/this week. |
| Why this is important to me: I’ve only been a manager for two months, and I really don’t have much experience managing people. Managing people is part of my job requirements. I really want to succeed as a manager—it fits in my plans for my career. But I’m clueless. | Consider: Is this linked to your performance goals? Have you faced this before? |
| Background information: John and I used to work on projects together. We would usually have lunch together a few days each week. We’ve known each other for 5 years, so I don’t understand why he’s holding back on information now. He knows I want to succeed as a manager. | Consider: Focus on this issue only. Don’t bring up irrelevant information. |
| Challenges I’m facing: How do I grow as a manager and still keep my friendship with John?  | Consider: Be open about who else is involved, nature of relationships, dollars and time.   |
| What I think I should do: I think I need to take John out for a beer and appeal to him as a friend. I’m sure he wants me to succeed in my new role. If we talk it out, I’m sure he’ll help me. | Consider: What are your top 2 or 3 options for facing this challenge? |
| What I want from my leader: Advice on how to manage John. I don’t want my mentor or boss to intervene in the situation. | Consider: What level of help do you want from your leader? |



**Feedback Planning Sheet Template for Employees**

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| --- | --- |
| Employee: | Session No. \_\_\_\_ of \_\_\_\_ |
| Leader:    | Date & Time: mm/dd/yr X:00 to X:00 |

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| My top issue to share with my leader: | Consider: This should be your top concern as of today/this week. |
| Why this is important to me:  | Consider: Is this linked to your performance goals? Have you faced this before? |
| Background information: | Consider: Focus on this issue only. Don’t bring up irrelevant information. |
| Challenges I’m facing:  | Consider: Be open about who else is involved, nature of relationships, dollars and time   |
| What I think I should do:  | Consider: What are your top 2 or 3 options for facing this challenge? |
| What I want from my leader: | Consider: What level of help do you want from your leader? |