LEADERSHIP IN ACTION

SUCCESSFUL FEEDBACK –
GIVING CONSTRUCTIVE FEEDBACK

Championed by the Phi Sigma Pi Foundation

Instructor's Guide

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Using the Instructor's Guide

The Instructor's Guide is formatted to help you best facilitate the session.
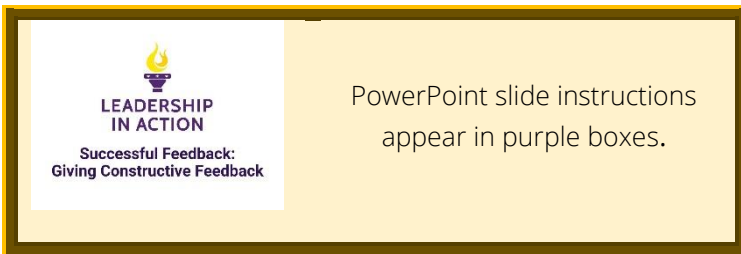
Text that is plain can be stated verbatim to the Members in the session. You should **focus your attention on the text on the odd pages**, not on the text on even pages.

> *Note:* *Text that is formatted like this is simply notes/suggestions to you as the Facilitator.*

> Exercises are also listed throughout the manual in blue textboxes. These exercises are included to reinforce the material covered.

LEADERSHIP IN ACTION
Successful Feedback: Giving Constructive Feedback

PowerPoint slide instructions appear in purple boxes.

In an effort to be sensitive to the timing of the session, please use page 9 in this guide to best determine how much time to spend on each page/exercise.

Materials Needed

The following items will be needed for successful implementation of this Module:

- □ LCD projector and screen
- □ Sound system or music player
- □ Microphone (if necessary)
- □ Lectern

- □ Copy of the Instructor's Guide
- □ Participant's workbook for each Member
- □ Stop watch
- □ Pencils/Pens for the group

Module Setup

To successfully facilitate this Module, consider the following:

- Each Module should have a Facilitator and a time-keeper. The time-keeper will be responsible for keeping track of time and the Module on schedule.

    o Have a chair available for both the Facilitator and the time-keeper. The time-keeper may be most efficiently placed in the back of the room.

    o The time-keeper should alert the Facilitator at given intervals, such as 5 minutes, 2 minutes, 1 minute, 30 seconds and time.

- Place chairs in circles (groups of 8 or 10) if possible.

- Play music to get Members in learning mode and set the tone for the Module. You can also use music for breaks and as Members are leaving the session.

    o Suggestions for entrance music (engaging):

        ▪ Classical
        ▪ Instrumental
        ▪ Trance

    o Suggestions for closing music (calming):

        ▪ New Age
        ▪ World

    o Limit playing music to around 10-15 minutes at any one time.

    o If you choose to have music playing during activities, be aware that it can compete with Members' attention and impact their concentration on the task at hand.

Instructional Design and Learning Philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert Instructional Designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Contents

Course Activities/Timing

Type of Activity	Segment	Time (min)
	Pre-Session	2
	Course Objectives and Introduction	1
	Defining Feedback	1
	Why is Feedback Important?	10
	Giving Constructive Feedback	5
	What's the TRIC?	15
	Handling Reoccurring Situations	15
	Giving Feedback Practice	15
	Wrap-Up	1
	TOTAL TIME:	65

Reading

Written Exercise

Facilitation

Group Exercise

Pre-Session (2 Minutes)

> **Note: Start on time!** *If additional time is required, acknowledge the time and state that we will begin in X minutes.*

> Begin use of **Successful Feedback- Giving Constructive Feedback** PowerPoint.
>
> LEADERSHIP IN ACTION
> Successful Feedback: Giving Constructive Feedback

> **Note:** *Welcome Members to the session by introducing the Module, yourself and any Facilitators assisting you.*

We are committed to accomplishing all of our objectives today. Therefore we will be sensitive to time, but if you have questions that are unanswered by the end of the Module or just want to learn more about the Leadership in Action program, please stay and ask.

> **Note:** *Use this as an opportunity to highlight Facilitators who may be assisting you and their experience with the program.*
>
> *For example, "Jane will be hanging around and happy to share about what she's gained from the program and even recommend some Modules."*

There are also recommended resources listed in the back of your workbook if you want to explore this topic in more detail on your own.

> **Note:** *Take a minute to show the resource page of the workbook.*

Notes

For those of you unfamiliar with Leadership in Action, this certificate program empowers you with the leadership skills to inspire a positive change in all facets of our Fraternity and our communities. Each topic is broken down into courses called Modules, you'll be able to take what you learn here today and **immediately** apply those skills to your Chapter, workplace and life.

Today we're going to talk about giving successful feedback. Since this program is geared towards personal growth, be open to new ideas and try new things to make the most of the experience.

Some of the ideas may challenge you. Welcome the challenges. Allow room for error as well as room to challenge yourself. Openness to new ideas will help you find the ones right for you. This room is intended to be a safe place to "try out" new approaches.

If you're familiar with this topic already, please share from your own experiences throughout the Module. Your examples provide a valuable resource for those who are learning about this for the first time.

Like the skills you'll learn today, the workbooks are yours to keep, so please write in them and take notes on the notes pages included at the back.

> **Note:** *Take a minute to show the notes page in the workbook.*

Before we get started, just a quick comment about your phone.

> You should see the **Cell Phone** slide.

This is an opportunity to focus on you and grow your skills, so if it helps to take a 65 minute "tech break" so that you can concentrate on you, by all means turn off your phone.

Workbook (page 2) - Course Objectives

Successful completion of this course will increase your knowledge and ability to:

- Implement a four-step process for giving effective feedback

- Choose language that conveys the specific results you want

- Handle reoccurring situations

Just remember that we're here to learn and grow together. So if you do use your phone at any time, please be respectful of those around you.

Well, now that the logistical stuff's out of the way, let's get started.

You should see the **Feedback-Giving Constructive Feedback** slide.

Course Objectives and Introduction (1 Minute)

Today, our goal is to learn how to give effective constructive feedback.

How we're going to do that is by first, implementing a four-step process for giving effective feedback.

Second, by choosing language that conveys the specific results you want.

And finally, learning how to handle reoccurring situations.

These are also in your workbook on page 2 if you want to refer to them.

Defining Feedback (1 Minute)

According to the American Heritage Dictionary, the word feedback has several meanings.

- The process in which part of the output of a system is returned to its input in order to regulate its further output.
- The usually annoying sound produced by a microphone or guitar amplifying its own sound.
- The return of information about the result of a process or activity.

Most are quite technical, but they get at the origin of the term "feedback," which is a relationship between two systems, A and B, where A's behavior changes based on input from B.

The thermostat is a classic example of this type of feedback.

However, when people are involved, there is no "autopilot" reaction to the input. In other words, people don't necessarily do anything, or do the correct thing, with the feedback they've been given.

Why is Feedback Important?
(10 Minutes)

Advance to the **Importance of Feedback** slide.
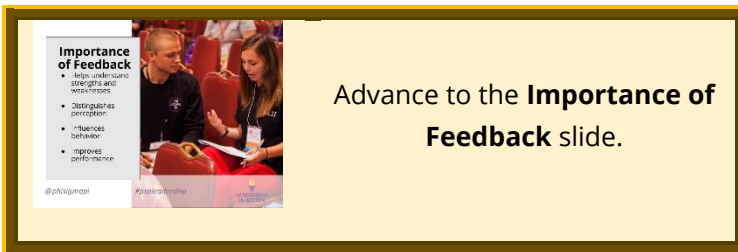
So why is feedback important? Feedback is important because it:

- Helps us understand our strengths and weaknesses
- Distinguishes between our perception of ourselves and others' perceptions of us
- Influences another person's behavior
- Improves performance in your Chapter and workplace by increasing confidence and competence

Would you like to give feedback that sticks? Do you ever hesitate to give feedback because you're not sure what to say? Do you get defensive when someone gives you feedback? This Module will give you answers to these questions as well as ideas about:

- Making you and your team more productive while sharing ideas
- Being more confident in your ability to recognize your team's needs and communicate solutions
- Minimizing conflicts and misunderstandings that can disrupt work flow

Notes

Workbook (page 3) – Why is feedback important?

- Helps us understand our strengths and weaknesses
- Distinguishes between our perception of ourselves and others' perceptions of us
- Influences another person's behavior
- Improves performance in the workplace by increasing confidence and competence

Give examples of the following that you have had:

Recall a situation in which you gave feedback that influenced someone's future behavior.

_____

_____

_____

Recall another situation in which you gave feedback that did not influence the person's behavior.

_____

_____

_____

What were the differences in those two situations?

_____

_____

_____

Turn to page 3 of your workbook and take time to reflect on situations where you gave feedback.

>
>
> **EXERCISE:** Individually, have Members complete the information on page 3 of their workbook.
>
> Debrief by having Members share what they wrote and focusing in particular on the last item—the differences should highlight the right ways/wrong ways to give feedback.
>
> **Allow 8 minutes.**

Giving Constructive Feedback (5 Minutes)

Advance to the **Giving Constructive Feedback** slide.

Giving feedback is important for the growth and success of any Chapter or business.

Chapters and businesses that promote open communication and structured feedback often enjoy higher productivity and superior morale.

To give more effective feedback follow this method:

- Set expectations: Share your expectations clearly, so that others have a foundation from which to work. They may never realize that they are actually doing something wrong.
- Assume positive intent: Most people are trying to do their best work. If they are doing something wrong, it is usually not intentional.
- Make an observation: Avoid using anything but first-hand knowledge when giving feedback—the information may not be accurate and you may be putting yourself in the "hot seat."

Notes

- Discuss only observable behaviors: For example: Discuss the tone of voice the Member used and not a negative attitude.
- Use details: When feedback is general, it is more likely to come across as blanket criticism rather than behavior that can be corrected.
- Describe the preferred behavior. Avoid giving too many suggestions at once and choose one or two behaviors to work on. Ask the Member or colleague for their input on what the desired behavior should look like. Look to star performers for standards or expectations.
- Talk about the future: Check for understanding. When you have finished giving feedback, check to make sure that the other person understands what you have said and what that person needs to do differently.

Create a plan for moving forward.

By doing this together you will be letting the person know that you are interested in their success and future with the team.

If a Member in your Chapter or an employee at work is far from the desired performance, set up incremental steps to reach the desired performance level.

What's the TRIC? (15 Minutes)

Advance to the **What's the TRIC?** slide.
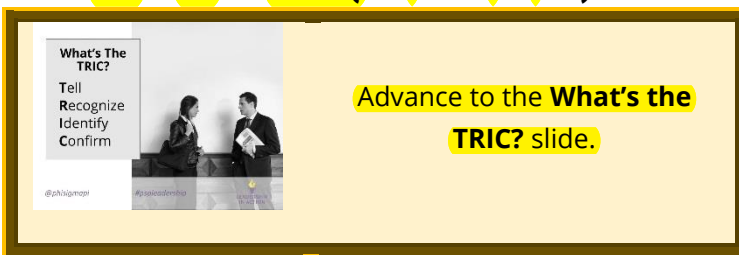
When the time comes to give constructive feedback, you may find yourself tongue-tied or falling over one of the hurdles that you identified earlier.

The model on page 4 of your workbook illustrates a "script" guideline that is helpful when giving corrective performance feedback.

Let's go over the TRIC model and the example provided.

First, tell the specific behavior that you would like to have changed.

Workbook (page 4) – What's the "TRIC"?

TRIC model	Example
Tell the specific behavior that you would like to have changed.	"*When you interrupt me during a meeting ...*"
Recognize what you are feeling about the situation or behavior.	"*I get frustrated because it breaks my train of thought ...*"
Identify the replacement behavior that you would like to see.	"*What I would like to see happen is that you wait to add your comments until after I have finished speaking.*"
Confirm understanding and end on a positive note.	"*I think you have great ideas to contribute and I believe the quality of our meetings will improve as a result of not trying to talk over each other.*"

Practice

Think of a situation in which you need to give feedback. Practice what you would say with a partner, using the TRIC model to "script" your discussion. Use the space below to jot down key words or thoughts. Switch roles so everyone has an opportunity to practice.

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Notes

For example, "*When you interrupt me during a meeting …*"

Then recognize what you are feeling about the situation or behavior.

"I get frustrated because it breaks my train of thought …"

Next, identify the replacement behavior that you would like to see.

"What I would like to see happen is that you wait to add your comments until after I have finished speaking."

Then finally, confirm understanding and end on a positive note.

I think you have great ideas to contribute and I believe the quality of our meetings will improve as a result of not trying to talk over each other."

So we are going to identify the problem, tell the person how you feel, then what you would like to see changed and end it on a positive note.

Let's put it to practice.

In partners. Think of a situation in which you need to give feedback.

Practice what you would say, using the TRIC model.

Switch roles so everyone has an opportunity to practice.

> **EXERCISE:** In partners, have Members follow the activity on page 4 of their workbook.
>
> Circulate throughout the room to answer questions and provide guidance.
>
> If Members are struggling, suggest they give feedback to someone who is chatting during a Chapter business meeting.
>
> **Allow 10 minutes.**

Workbook (page 5) – Handling Reoccurring Situations

Possible cause	Solution
Needs Training	Train, educate, mentor, shadow
Skill Level	Evaluate skills, strengths, and aptitudes and relocate to a more appropriate position
Authority Obstacles	Restructure workspace, schedule, and people on the team to facilitate performance
Task Performance	Point out attitude problems, suggest course of action, and get the person to commit

Practice: Identify the cause of the following problem and brainstorm possible actions that you could take to help the employee.

1. Gregory makes an error on every project he manages. There is no pattern or consistent mistake being made, and he has been trained several times on the processes.
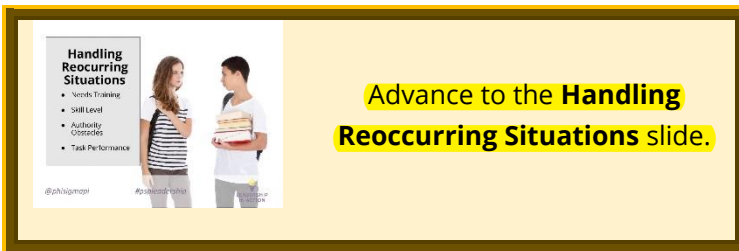
What's Gregory's problem?

_____
_____

What actions could you take?

_____

_____

_____

Handling Reoccurring Situations (15 Minutes)

Notes

Advance to the **Handling Reoccurring Situations** slide.

Let's say you've followed the guidelines and spoken to a Member of your Chapter or an employee about a specific situation, but you've seen no change or improvement, the situation just keeps reoccurring.

You even had a casual chat along the lines of, "How's it going? Do you need any help?" Still nothing? What do you do now?

When a leader is faced with a performance problem, the leader should determine the root cause, if possible.

There are four categories of performance issues:

- Needs Training
- Skill Level
- Authority Obstacles
- Task Performance

If you've given feedback to a Member or an employee and you don't see any change, you may need to do some detective work to discover an underlying cause.

Listed on page 5 of your workbook are some possible causes and solutions.

Let's go over them.

If a Member of your Chapter or an employee at work is not sure on how to perform the task think of ways that you can help them understand.

That could be training them, pointing them in the direction they need to figure out the solution, being a mentor or having them shadow someone who is successful in the role.

Notes

A perfect example of this would be with Officer transitions.

If after Officer transitions, the newly elected Officer isn't quite understanding the job elected for, have the past Officer step in and help guide the newly elected Officer.

Or, if a Member in your Chapter can't perform the tasks because of their skill level, try giving the Member a new position the Member can succeed at.

If the Member isn't allowed to perform the task because of a schedule conflict or another obstacle, for example, try finding a time that works for everyone.

Lastly, if the person is just not willing to do the task, point out the problem and suggest the course of action.

Now let's practice. In small groups, read the case study on page 5 of your workbook and decide which category this situation falls into and what actions can be taken to improve the situation.

> **EXERCISE:** Have Members break out in small groups.
>
> Read the case study on page 5 and decide the cause of the problem and actions that can be taken to help the employee.
>
> *Possible solution: The root cause is probably that Gregory can't perform the job tasks. He has been trained and there is no indication that Gregory is unwilling to perform the tasks or that he isn't allowed. Therefore, the best option may be to re-evaluate his skills and realign work responsibilities so that he is given tasks that better suit his skill set.*
>
> Have Members share their answers.
>
> **Allow 10 minutes.**

Workbook (page 6) – Giving Feedback Practice

Now it's time to put all the pieces together. Think back to the feedback situation you described at the beginning of the program (the one that didn't go well). You will role-play that situation using the tips and guidelines we have discussed. Work in groups of three, with a second person acting as the person receiving the feedback and the third acting as an observer. The observer can use the space below to jot notes about what was observed to give feedback to the person doing the role-play. Note: The observer should follow the guidelines for giving feedback as well!

Round 1

_____

_____

_____

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Round 2

_____

_____

_____

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_____

Round 3

_____

_____

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_____

_____

Giving Feedback Practice (15 Minutes)

Notes

Advance to the **Feedback** slide.

Now it's time to put all the pieces together.

Think back to the feedback situation you described at the beginning of the Module (the one that didn't go well).

You will role-play that situation. Remember to use the TRIC model and to examine the possible causes for handling reoccurring situations that we have discussed.

Work in groups of three, with a second person acting as the person receiving the feedback and the third acting as an observer.

The observer can use the space on page 6 of your workbook to jot notes about what was observed to give feedback to the person doing the role-play.

EXERCISE: Have Members conduct this activity in three rounds so that each person has a chance to role-play their individual situation.

Switch roles so that each person has a chance to act as an observer and deliver feedback using the guidelines provided.
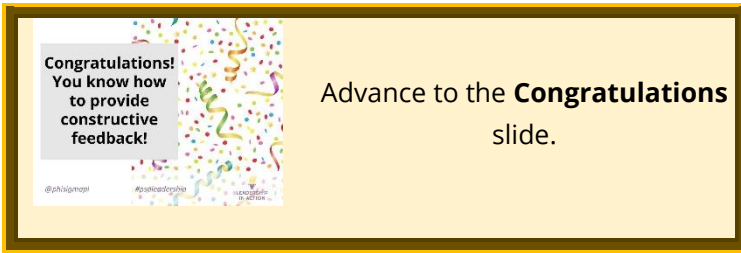
Debrief with the entire group.

Note: The observer should follow the guidelines for giving feedback as well.

Allow 10 minutes.

Wrap-Up (1 Minute)

> **Congratulations! You know how to provide constructive feedback!**
>
> Advance to the **Congratulations** slide.

Congratulations! You now know how to provide constructive feedback.

Our goal today was to become skilled at giving feedback successfully and we did it.

We did it by first, implementing a four-step process for giving effective feedback.

Second, by choosing language that conveys the specific results you want.

And finally, learning how to handle reoccurring situations.

Now it is time to take what you learned today and use it in your daily life.

Giving constructive feedback takes practice. Use the resources on pages 7 through 9 of your workbook to continue to practice.

Remember that written feedback is a more permanent record than a conversation, and therefore, it requires your message to be especially clear and accurate.

I challenge you to use what you learned here today to work better with those within your Chapter or workplace through stronger communication.

In The Ritual it says, *"The scholar who is not fortified with Tolerance, or open-mindedness, is certain to be conquered by Prejudice."*

It is important to keep in mind, that most people are more comfortable with old problems than with new solutions.

Keep an open mind when it comes to giving and receiving feedback.

Note: *If you have time, offer the following option for Members who are interested in exploring the topic more:*

"If anyone is interested exploring more we've learned today, you're welcome to stay to discuss with one another what you've learned from the module and how you can use it in your everyday lives."

Advance to the **Suggested Modules** slide.

If you'd like to learn more, you can grow your skills with Leadership in Action Modules. On page 11 of your workbook, there are three suggestions of Local Modules that will fit perfectly with this one. The Modules are:

- Successful Feedback- Receiving Feedback
- Conflict Management- Say What?
- The Great Balancing Act- Take A Chance On Me

You can request the next Module we hold as a Chapter at phisigmapi.org/requestamodule.

Note: *Bring a computer with you to the Module so that Members in your Chapter can enroll and request a Module right there.*

phisigmapi.org/requestamodule

phisigmapi.org/liasignup

Notes

Advance to the **Enroll** slide.

Before you leave, take time to enroll in Leadership in Action.

This is how the points you earned today can start adding up to your Certification, which is earning 75 points.

Plus, it can get you up to 8 more points just for filling out the form.

You can enroll at phisigmapi.org/liasignup.

Advance to the **Share Your Experience** slide.

If you enjoyed today's Module, grab your phone and take a selfie or wefie.

With a photo or quick video, share your experience about today's Module. What you learned, what you liked, or even why other Members would enjoy this Module.

Remember to tag Phi Sigma Pi and include the pspleadership hashtag.

Fill out and return the course evaluation at the end of your workbook.

Thank you for your participation and congratulations on completing the **Successful Feedback- Giving Constructive Feedback** Module.

Complete the certificate in the back of your workbook and display it proudly.