

FEEDBACK CAMPAIGN PLANNER



Start with 'Why'

1

Everything flows from 'why'. This template helps figure out the right feedback questions by starting with the bigger picture and working from there.

The Timeline

2

A clear schedule will help your progress. This template maps out your feedback plan against an annual or quarterly timeline.

Feedback Loops

3

Learning from feedback is a rolling process. This template helps you identify what you'll look for and how you'll react to it when you see it.

Going Live

4

Everything is easier with the right people on board! This template helps you identify those people and how you can get them on your side.

1 Start with 'Why'

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Overall Goal

Why are we doing this? What are we trying to achieve with the feedback?

If you understand your organization's direction of travel, you'll be more confident that your feedback plan is relevant.

Measure of Success

What data do you need to prove you achieved the goals?

The best proof is objective and quantifiable. Thinking about this upfront will ensure you know how to demonstrate success or make adjustments as necessary.

Participants

Who are we getting the feedback from?

Identifying your target population will help you think about how to phrase your questions.

Touchpoints

Where in each person's journey will we capture their feedback?

You'll get more feedback, and more relevant feedback, if you intervene at the best point in the journey.

Questions

What will we ask at each touchpoint?

Now you've filled out the previous details, the questions should be quite obvious to you! If they are not, refining your answers above will help.

2

The Timeline

A clear schedule will help your progress. This template maps out your feedback plan against an annual or quarterly timeline.

When will we run these questions at these touchpoints?		
Defining clear start and end points for a specific set of questions will help you focus on what matters at that time of year.		
Q1	January	
	February	
	March	
Q2	April	
	May	
	June	
Q3	July	
	August	
	September	
Q4	October	
	November	
	December	

Agility Factors

The next three questions will help you think in advance about external factors that might force you to change the feedback campaign.

What could cause us to change the timeline?
What could cause us to change the touchpoints?
What could cause us to change the questions?

3 Feedback Loops

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Regular Reviews

How will we review the feedback?		
You can only improve with regular reviews of the feedback. Knowing what to look out for will help you be more structured.		
How Often?	What should we look out for?	What metrics will we use?

Triggers

What would trigger an immediate inspection at each touchpoint?
Aside from the regular reviews, there might be specific circumstances that you should plan to look out for too.

Celebrations

How will we celebrate the top performers?
Planning how you will provide positive feedback will help you reinforce good habits, which means improvements will come faster.

Lessons Learned

How will we turn local lessons into global improvements?
Sharing success stories across the organization will turn one-off wins into your new normal.

4

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Permissions

Who needs to sign off on this before we start capturing feedback?		
Knowing this in advance will prevent any unexpected delays.		
Department	Person	Reason

Materials

What 'things' do we need before we start?		
This will help ensure you get all the materials you need and avoid any unexpected surprises.		
What	When	Who?

Frontline Teams

Who is on the front line? How will we get them on board?	
The people on the front line will respond positively and help you if you tell them about your feedback campaign before you start.	
Team	Motivating Factors