A guide to giving 1:1 **feedback virtually**

Being a practitioner, you know the impact that a personality feedback can have for an individual. You know how to give effective face-to-face feedback on a questionnaire, but what happens when you are faced with giving feedback via call or video chat?

Face-to-face feedback sessions have lots of benefits. Sitting in a room together, you have the benefits of eye contact and body language and you can pick up on whether the client is listening, enjoying the session, or becoming uncomfortable. However, with time and cost restraints, as well as the rise of the virtual team, it is becoming more and more common to give remote feedback on personality questionnaires. To do this successfully, practitioners often need to adjust their approach and add to their skill set to give feedback in a way that is different from what they have originally learned.

Remote feedback can be just as effective as a face-to-face session, and the right choice of technology and materials can really add value. With this in mind, we have put together a step-by-step guide on how to give effective feedback remotely and how to make it engaging.

1. Choose your technology

The range of technology out there is growing. The main thing here is to choose a method you are comfortable with. There's no point getting interrupted halfway through your session by technology not working. Questions to ask yourself include:

- How good is my telephone reception? If you have limited signal for telephone calls, you can try using call or conferencing apps instead.
- How good is my internet connection? You may need to avoid screen sharing or video if you have a weak connection.
- What does the client want? Some people prefer being able to see the face of the person they are talking to, whilst others may prefer only audio.

2. Choose your materials

New e-book versions of the MBTI materials are now available. However, whether you decide to use e-books or hard copies, here are some of the essentials:

- MBTI development workbook
- FIRO-B report booklet
- Feedback cards
- Introduction to Myers-Briggs Type
- Introductiont to the FIRO-B instrument

Decide when to send the report

For questionnaires like MBTI Step II, it can be useful to send the report just before the session so that they can visually follow along. However, with feedback sessions in which you ask the client for their predictions before feeding back the results (e.g. FIRO-B and MBTI Step I), send the report over straight after the feedback session, and if possible email it to them and go through it together whilst you are still on the call.

Tip

It's really important that the report is sent just prior to giving feedback (in the case of MBTI Step II) or just after initial stages of feedback (in the case of MBTI and FIRO). Sending a report a day or two in advance of a feedback session would not be good practice (even though it might feel like good preparation!) because it would mean a person had received psychometric data without the immediate benefit of interpretation by a qualified practitioner.

Group remote feedback?

Virtual teams are on the increase but can remote group feedback be effective? Group remote feedback can be done, and it is done best using conferencing software. With MBTI feedback, split up into smaller groups for the exercises and then debrief in the larger group.

However, without face-to-face interaction, it can be difficult to observe differences between people with different personalities, which is one of the main advantages of group feedback. The other challenge is that it's difficult to get the same group rapport, safe atmosphere and trust via webinar or conferencing software. So, it can have limited power. Individual feedback sessions with each member of the group may be a better option.

3. At the start of your feedback session, include practicalities when contracting

As well as checking how much time your client has available and agreeing a purpose for the session, it's important to get the client set up and ready for the remote feedback, as well as checking some of the practicalities up front.

Tip

In terms of logistics, you need to confirm that they are somewhere that they are not going to be overheard. If you don't, then it can lead to difficult conversations as they will struggle to talk openly if they are worrying about colleagues overhearing the conversation.

4. Actively build rapport

Start off the session by actively finding out about your client and finding out their reasons for completing the questionnaire. Even simple things help to build rapport, such as asking, "How has your day been so far?" and showing you are listening.

5. Use visuals

Consider using some visuals to brighten up your feedback session and bring it to life. These might be on the paper materials you send to your client (the MBTI Development Workbook, *Introduction to Type* or *Introduction to the FIRO-B Instrument*).

Alternatively, if using conferencing software, the MBTI Step I, Step II and FIRO-B feedback slides are a good option.

6. Listen actively

Draw out your listening skills even more in a remote feedback. This will encourage the client to open up more and help to foster an open two-way conversation. For example:

- MBTI development workbook
- Add some 'active listening' words, such as "yes" or "I understand" at natural pauses of their speech, to reassure them you are still listening.
- When asking questions don't ask lots all at once and don't interrupt answers.
- Summarise and check understanding more frequently than you would face-to-face, because you won't have visual clues as to how your client is responding to you.
- Avoid getting distracted. Make sure you yourself are in a private space and are free from distractions.

Contracting checklist for remote feedback

- ✓ Check how much time your client has available
- ✓ Check your client can hear you properly
- ✓ Plan who will ring back if you get cut off
- ✓ Make sure your client is in a private area where they will not be overheard
- ✓ Make sure they're able to take notes
- ✓ Check they have the MBTI/FIRO materials (e.g. MBTI Development Workbook, Introduction to Type booklet)

Tip
When giving feedbacks, it is more difficult to manage non-verbal communication as you don't see each other's face or make eye contact, so the client can often talk about themselves but not have the confidence that you are, indeed, still listening. If there's no option to work with video and you are using audio only, when you let the client talk about themselves in the feedback session, just add in some 'active listening' words, such as 'yes', or 'I understand', at natural pauses of their speech, just so they know that you are still actively listening and engaged (and that the line hasn't gone dead!).

7. Ask lots of questions

In order to get the balance right between you explaining and your client speaking, ask lots of questions throughout the feedback session. For example, check in for questions, comments or reactions after each result is fed back, to keep up the interaction and check that your pace is right. Also, include the client more during your introduction by asking simple questions such as:

- Have you completed any other psychometric assessments before?
- What was your previous experience like?
- Have you heard of Carl Jung/MBTI/FIRO-B?
- How do you intend to use this information?

You can also use the feedback cards to probe for examples, and explore what the personality results mean for the client.

Tip
Ensure that every few minutes you ask an open question so that your respondent is encouraged to speak regularly.

8. Signpost clearly throughout

A simple yet essential thing is to signpost clearly by referring to the structure of the feedback process. Keep informing the client where you are in the process, e.g. "Now we are going to explore some questions to help you think about how this preference is relevant to your development." If you are using any materials, make sure you let the client know which page to turn to and where to look. This will make sure the whole feedback process runs smoothly and avoids confusion.

Tip
When giving feedback using only audio, it's even more important to clearly signpost and talk about the whole process of the call and give them sufficient structure because you won't see their confusion and they may not voice this until much later.

9. Encourage note-taking

Avoid over-reliance on auditory information by asking the client to write down their results. This is particularly useful for the FIRO-B questionnaire to help the client see links between different aspects of the profile. Encourage clients to also write down any notes or development points they want to take away from the session. Don't forget to ask them to tell you when they have finished writing.

10. Read descriptions aloud

As you would normally do in a face-to-face session, give clients a more in-depth picture of their personality profile using books such as *Introduction to the FIRO Instrument and Introduction to Myers-Briggs Type*. You may want to read out sections from the book, being aware to check in with the client every few minutes. The alternative is to send them the materials, direct them to the correct part of the book and ask them to read the section themselves.

11. Don't let them forget!

After your session, send the client their report and encourage them to think about how they might use this information. Invite them for a brief catch up a week later, once they have had time to reflect.