

Effective Check-in Checklist

12 TIPS FOR HAVING AMAZING CHECK-INS

workhuman*

The result of a more collaborative check-in is an engaged employee who will stay the course as your organization grows and evolves.

The employee-manager relationship is one of the most critical elements of the employee experience, driving engagement, productivity, and retention. And one of the primary tools for managers and employees to communicate and stay in sync is the check-in. As the frequency of check-ins increases, the more effective employees are in meeting their goals and growing with the organization. The following are some helpful tips for managers and employees to have more positive check-in experiences.

1. Prepare.

For both employees and managers, there is nothing worse than having to jog memories and remind the other person what was discussed the week prior. Before a check-in, spend a few minutes doing a bit of prep work, including reviewing the previous week's notes and priorities.

2. Have the right mindset.

Each person should come to the check-in with a mindset of trust, honesty, and positive intent. Even if there are difficult topics that need to be discussed, having an open mindset creates a safe environment where an authentic discussion can occur.

3. Begin with, "How are you?"

The first part of the check-in should be a brief discussion of how each person is feeling. For example, ask the other person to share one word or phrase that encapsulates how they feel. The more authentic and vulnerable each person can be, the more trust is built.

4. Start with recognition.

By setting a tone of positivity at the beginning of the meeting, you set the stage for trust, collaboration, and open communication. Don't forget to mention what is going well and what has been learned since the last check-in.

5. Tackle one topic at a time.

Try to keep check-ins focused on one primary topic. Each check-in should fall into three distinct categories: tactical, developmental, or career-focused. It's best practice not to mix different types of check-in topics.

6. Let the employee guide the conversation.

As part of a continuous performance management philosophy, the employee is at the center of their development and growth. Because check-ins happen regularly, each meeting should be focused and action-oriented.

7. Leverage conversation starters.

There is nothing worse than having a check-in where either person feels like they are being bombarded with questions or listening to a barrage of complaints. Both examples erode trust and productivity. To make the meeting more collaborative, try some conversation starters – open-ended questions¹ that drive reflection and discussion.

8. Focus on learning and growth.

Keep the focus on learning and growth, as opposed to negativity and complaints. Instead of: "Why didn't you get X done," try: "What solutions do you think will help you navigate challenges you are encountering?"

Source

1 <https://resources.globoforce.com/globoforce-blog/start-leading-with-a-coach-approach>

2 <https://resources.globoforce.com/globoforce-blog/here-lies-bureaucracy-command-and-control-management-is-dead>

9. Connect.

Although the focus of the check-in should include priorities, tasks, and challenges, there must be an emotional connection between the employee and the manager. Otherwise, the conversation is awkward and transactional. Spend a few minutes discussing non-work items, such as family, current events, or even sports, in order to build rapport.

10. Actively listen.

Try to keep multitasking – such as checking texts or emails – to a minimum. When both parties are actively listening, the chance of miscommunication decreases and trust increases.

11. Ask for feedback.

There is nothing more empowering than when an employee and manager can ask each other for feedback. Check-ins can be a safe and trusting environment where feedback becomes a natural part of the manager-employee relationship.

12. Check in with others.

As organizations become flatter² and more matrixed, check-ins should not be reserved just for managers and their direct reports. Check-ins can occur between peers, teams, and team leads with individuals on the team. The same principles apply regardless of who is part of the check-in.

- Check-ins are an essential part of the employee experience, providing employees the opportunity to receive feedback on a continuous basis. The result of a more collaborative check-in is an engaged employee who will stay the course as your organization grows and evolves.

To learn more about how Conversations® can improve your check-in, goal setting, and feedback processes, contact Workhuman®.



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