



How to Manage Your Check-Ins

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Overview

As a growing company, we need to establish a consistent and replicable process for discussing performance, goals, career path, and general job satisfaction with our team members. Not only do we want to use this process to discuss performance and progress towards goals, this process should give us an opportunity to have a candid conversation about employee satisfaction and allow managers to also obtain feedback about their performance from an employee perspective.

New social science and organizational psychology are finding that the traditional annual review process is counterproductive for both employees and managers. In fact, it usually has the opposite impact on goal behaviors. Our focus will be on creating a process that is: simple, ongoing throughout the year (as opposed to only being an annual or semiannual process), and based on two-way feedback rather than a manager to employee rating system.

Traditional Performance Reviews fail in several aspects. Employees typically rate themselves more positively than their managers and the ensuing conversation results in disappointment and poor performance. The typical process is also extremely bureaucratic with managers losing hours of productive time in completing review paperwork and updating performance management systems. See Appendix below for additional details.

Unlike traditional Performance Review systems, the Check In process is largely employee driven. The manager's role in the process isn't to judge the employee; instead, the manager provides coaching on employee provided feedback on their own performance. This empowers the employee to own their performance and creates a partnering relationship between the employee and manager.

Because Check In meetings are based on coaching and two-way conversations, each manager can adapt the format to their personal management style and the needs of each individual employee. The Check In process recognizes that there isn't a "one size fits all" solution for every manager and every employee.

What Success Looks Like

- Every team member is talking to their manager on a regular basis about what success looks like in their role. This is a conversation larger than the 1:1, it is focused on goals, compensation, challenges, and new skill mastery.
- The Check-In conversations are forward-looking, they help team members see past the day-to-day and understand how to grow in their roles or skill set.
- Every team member has a clear action plan that allows them to improve and grow. This aligns with our value [INSERT VALUE]
- Everyone at [COMPANY] is clear on why they are paid their current salary, they have a venue for discussing compensation on a regular basis, and they have an opportunity to discuss how they can earn more if that's their desire.
- Our team is self-aware. They know what they are good at and they are constantly working to improve places where they have gaps or opportunities. No one is ever surprised by feedback.

Details

Check-In vs 1:1s

Check-Ins are designed to be one element in the overall employee development framework, taking into account all the tools you have available. One-on-ones should be used to dive deeper into specific tasks while Check-In meetings focus on high-level discussions on overall progress.

Expectations

[COMPANY]'s philosophy is that employees take ownership of driving their own growth and development. A manager's role is to encourage, not direct, employees on their journey. Managers help

provide business context; how the development can positively impact the business. You and your manager will have a discussion about your vision for your career development. Once a plan is established this will become the heart of your quarterly Check-Ins.

In line with our value of [INSERT VALUE], you and your manager will provide each other with ongoing, constructive feedback. Feedback goes both ways; not only will your manager provide you with coaching, you should also use this time to provide your manager with candid feedback and ask for any additional support you need to achieve your goals.

Effective Check In discussions should produce the following:

- Establish clear expectations to help you achieve business and personal goals
- Establish clear expectations to help you achieve desired pay raises and promotions
- Calibrate on progress towards goals and development
- Identify the support you need to drive your own growth and development
- Share feedback on ways you and your manager can embrace [COMPANY]'s values to the fullest

Process

We want each employee to own their Check-In process because it is the foundation of your career and compensation development. If you want to grow and advance, the Check-In process is the tool.

We'll remind you to begin the process but beyond that, the process is yours to own. We want to see you take extreme ownership of your career and goals.

The central tool for the Check-In process is the [Check-In Form](#). You'll first add questions to the Check-In Form, and then you'll add your answers. Why pick your own questions? Think of this as a bit of soul-searching or a journaling exercise. The Check-In is a time to zoom out and evaluate where you are in your career and how you're tracking against your personal and professional goals. The questions themselves are just prompts to help get your thinking started. If you need help thinking of questions, feel free to select some from the Appendix below. But don't feel constrained by these, feel free to make up your own questions. The goal is to look deeply at yourself and your progress and honestly document how you're feeling. The goal is a conversation, there are no "right" answers.

In the Check-In Meeting, your Manager will discuss your questions and answers with you. They may pose some questions of their own. This meeting is a conversation, a chance to reflect and review with your manager giving feedback and perspective. Remember, you own this meeting. It's yours to lead and you must make sure you get what you need from the call. Some things you may want to consider:

- Talk about your goals and why they are important for you and [COMPANY]
- Talk about our values and how you are enacting them in your work.

- Talk about how you feel about your progress toward your goals. Do you have a clear understanding of what's expected of you? This is a good time to ask for clarity.
- Talk about where you and your manager are aligned or misaligned on perceptions of your progress
- Be candid about the job title and salary you'd like to achieve
- Be candid about your feelings. What makes you inspired in your work? What frustrates you?
- Ask for help. Take extreme ownership and identify the areas you need more support.

At the end of the meeting, you'll discuss your Goals and Action Plan. The Goals and Action Plan can be as detailed or as vague as you want it to be. This, again, is solely for your benefit. If you're in a great spot in your career right now and don't feel the need for a lot of changes, that's great - focus on some small wins or adjustments you may want to focus on in the next 90 days. Maybe pick one theme for the next quarter (i.e. attention to detail, exceptional service, great communication) and make that your goal. Or if you want to make bigger changes or focus on a comp change, maybe you want to get more specific with an Action Plan that details new skills you plan to master or goals you plan to hit. It's yours to define as you see fit.

Process Steps

1. Team members: will receive a task on a recurring, quarterly basis reminding you to initiate the Check-In Process
2. Team members: complete the [\[COMPANY\] Check-In Form](#) (make a copy of the template) by adding your own questions and answers.
3. Team members: schedule a meeting with your Manager to review the Check-In. Attach the completed Check In to the meeting invitation.
4. Team member + Managers: In the meeting, you will review and discuss the Check-In form. The Manager can provide coaching and feedback. Together, you should agree on an Action Plan to help the Team member take the next steps in their role and career.
5. Team member: In the meeting, you should take excellent notes. After the call, you should document the Action Plan. Once complete, return the Check-In to your Manager.
6. Manager: Review the completed Check-In and Action Plan. You can add optional Manager Notes if you wish. Once complete, add the final Check-In to Bamboo in the Check-Ins Folder.
7. Manager: Make sure that every team member has a completed Check-In quarterly.

Appendix

The Move From Traditional Performance Reviews

<https://appirio.com/cloud-powered-blog/why-year-end-employee-reviews-are-becoming-obsolete>
<http://www.newyorker.com/business/currency/the-push-against-performance-reviews>
<http://blogs.adobe.com/adobelife/2014/01/08/just-checking-in/>
<http://7geese.com/learn-how-adobe-abandoned-the-yearly-performance-appraisals/>
<https://www.fastcompany.com/3052135/the-future-of-work/why-the-annual-performance-review-is-going-extinct>

Question Bank

Feel free to use these or write your own

Describe what success looks like for you this year / quarter. On a scale of 1 to 10, how close are you to achieving that vision?
When we meet in Q4, what title would you like to have? What salary would you like to have? How close do you think you are to that goal?
What do you think are your biggest wins since our last Check In?
Fast forward to December. If you were writing a description of your achievements over the past year, what would it say?
Which areas make you feel like your hands are tied or you are unable to reach your full potential?
What's the most important thing you've learned since our last Check In?
What is the biggest challenge you are currently facing? How can I help with that?
What have you tried recently to overcome challenges?
Where do you think your strongest skills are? Where do you want to improve?
What else can I be doing to help you grow/advance in your career?
How can I help you achieve your goals? Please be specific.
What would you like to be doing more of, less of, and what's important to your career?
Does your work life make you happy? Are there changes you want to make? How can I support you?
What can I do to help you enjoy your work more or remove roadblocks to progress?
What support do you need from me or others to achieve your goals?
What advice would you give me to help improve my effectiveness as a manager?

Looking back over the past several quarters, what have you learned in working in the “project” model? Do you think you’ve grown?

We are a company that believes in constant learning. What is one change you want to commit to making over the next quarter? What’s the benefit for you? For [COMPANY]?

What value do you think you exhibit the most? Which one do you exhibit the least? Are there specific things you want to do differently to better live our values?

How are we as a company living our values? Are there places you feel we’re misaligned and not living up to our expectations?

List our values. How do you think your peers would rate you for each value? Why?

What is at least one thing I can do to help you achieve your goals and be happier at work? (please feel free to add more)

For questions ask

[HR MANAGER NAME]