



“CHECK-INS”: A DISCUSSION GUIDE FOR MANAGERS

Frequent “check-in” discussions are more effective at motivating employees than traditional, annual performance reviews. The following is a sample checklist you can use when having a structured performance “check-in” with your employees, as an alternative to a traditional, annual performance review.

Discuss the Purpose of the Meeting:

- *“Today’s goal is to touch base, recognize the great work you’ve done since we last met, share collaborative feedback, set goals, and discuss how I can support your goals.”*

Ask for a Self-Assessment/Coach the Employee:

- *Ask: Since we last met, what have you been working on that went well? What didn’t go so well? For the things that didn’t go so well, what do you think you could do differently next time? What support do you need?*

Recognize Accomplishments:

- Tell your employee all their specific accomplishments that you’ve noticed since you last formally met.
- Most importantly, tell them **why** their accomplishment was so important, i.e. how it ties to your organization’s mission/values.

Set Goals:

- *Ask: What are your goals for the upcoming time period?*
- Discuss any goals or projects you would like for them to achieve that they didn’t mention.
- Discuss why their goals are important/how their goals impact the “big picture,” i.e. the team, clients, the mission, etc.
- *Ask: What support, (i.e. training, support from other departments, procedure changes, etc. do you need to achieve your goals?*

Seek Feedback:

- *Ask: What feedback do you have for me? What can I do to better support your success?*

Closing:

- Summarize what you discussed and thank them for their time. Confirm the next meeting day/time.