



Check-in Checklist

CHECK-IN THREE-TIERED FRAMEWORK

- ☐ **Expectations:** Set, track, and review clear expectations/goals (what and how) and clarify roles, responsibilities, and success criteria frequently throughout the year.
- ☐ **Feedback:** Give and receive ongoing feedback and coaching on a frequent and timely basis to recognize and address and/or improve performance against expectations.
- ☐ **Growth:** Provide opportunities to develop and increase skills, knowledge, and experience in employee's current role in alignment with business needs and individual aspirations.

EXPECTATIONS

- ☐ Managers and employees set, track and review goals.
- ☐ Memorialize mutually agreed upon goals.
- ☐ Clarify roles and provide feedback.
- ☐ Check-in on progress with goals.
- ☐ Managers –How can you best support employees with reaching goals?
 - What is going well? What are the roadblocks?
 - Paint to me what done looks like? Do we need to revise goals?

REMEMBER to keep track of performance throughout the year.

- ☐ Keep notes on accomplishments and issues.
- ☐ Is your performance reflective of our pillars and values?
- ☐ Any changes to your job duties?
- ☐ How is your attendance?

*Managers, reach out to HR if you need assistance in assessing performance and providing constructive feedback.

FEEDBACK

- ☐ Feedback conversations provided answers to two questions:
 - 1) “What does this person do well that makes them effective?” and
 - 2) “What is one thing, looking forward, they could change or do more of that would make them more effective?”
- ☐ Refers to ongoing, reciprocal coaching on a regular basis. Once the goals are clear, and how close to meeting them is established, feedback is how employees learn to improve performance and more quickly achieve their goals.

GROWTH AND DEVELOPMENT

- ☐ Growth in knowledge, skills, and abilities that would help employees perform better in their current role.
- ☐ Manager understands each of their employees' long-term goals or career growth and work to align those goals with current objectives and opportunities.
- ☐ Check in regularly and frequently.
- ☐ Progress is greatest motivator. Manager asks about status of goals and what they can do to support their employees' progress.