Check-in Template

A CHECK-in is not an update on projects, but a conversation that focuses solely on what is important to the team member. They are meaningful, recurring conversations that allow for an exchange of thoughts and ideas.

A CHECK-in conversation is:

- Positive and forward-focused to improve individual and collective work performance.
- Centered on the team member's ideas, needs, and concerns.
- A safe place to communicate.

Connect

Lower threat and increase trust by beginning with a personal connection.

"*Hi Jill. How did your daughter's soccer game go last weekend?*"

Hear

Use generative listening and questioning to understand what is most important to the team member at this moment.

- *What accomplishments are you celebrating?*
- *Who has been particularly helpful?*
- *What challenges are you encountering?*
- *What can I do today (or this week) to help you move forward?*

Empower

Resist the urge to solve and tell. Stay in coaching mode and involve the team member in finding solutions.

You mentioned tight deadlines as a challenge.

- *What recommendations do you have?*
- *What would be helpful?*
- *What has worked well in the past?*
- *How do you suggest we communicate these changes to the team?*

Commit

Recap the conversation to ensure you and the team member are clear on the next steps.

"*To clarify, I will discuss login requirements with IT. I can do that today. You will add the security alert to our agenda in next week's team meeting. Did I get that right? I look forward to our next CHECK-in on DATE.*"

Keep

Follow through and follow up on all commitments. Prioritize CHECK-ins on your calendar.