

# 10 Minute Check-In Conversation Guide



Preparation is the key to a fast and effective performance check-in between managers and employees.

## This guide helps managers and employees:

- Prepare for an efficient check-in conversation
- Organize ideas and make note of key successes and challenges ahead of time
- Anticipate what topics both parties will want to cover
- Decide together on next steps for the employee

## Instructions:

### MANAGERS

Provide this worksheet to your employee two days before the scheduled check-in. Use the “notes” area in sections 2 and 4 to prepare for and guide the discussion topics you want to cover during the check-in. Be ready to provide answers to your employee’s questions in sections 3 and 5 once they have returned the worksheet to you!

### EMPLOYEES

Review each section of this document as you reflect on the time since your last check-in conversation with your manager. Use section 1 to identify your key accomplishments and priorities. In sections 3 and 5, check-off the topics and questions you want to discuss during the check-in. Keep the original and make a copy of this document with your selections marked to share with your manager 1 day before your scheduled conversation. Use the “notes” section to capture your thoughts and prepare for your discussion!

WHO	TOPICS AND IDEAS FOR QUESTIONS	NOTES
<p>1. EMPLOYEE ~1.5 minutes</p>	<p><b>START THE MEETING WITH:</b></p> <ol style="list-style-type: none"> <li>1. Highlighting your recent contributions. What priorities have you achieved since your last check-in? What priorities will carry forward to your next check-in?</li> <li>2. Asking what new priorities have emerged for you, your team or the organization?</li> </ol>	
<p>2. MANAGER ~1.5 minutes</p>	<p><b>KEEP THE CONVERSATION GOING WITH:</b></p> <ol style="list-style-type: none"> <li>1. Sharing your insight on evolving work priorities that impact and involve the employee.</li> <li>2. Highlighting the contributions to key work priorities that the employee has helped achieve since your last check-in.</li> <li>3. Describe the actions to be carried out to move important initiatives forward until your next check-in. What can the employee do to help?</li> </ol>	
<p>3. EMPLOYEE ~2 minutes</p>	<p><b>YOUR PERFORMANCE: Now and Moving Forward. Check 1-2 questions you'd like to ask your manager:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What's on thing that I'm doing well and that I should continue with?</li> <li><input type="checkbox"/> What's one thing I'm doing to support you that is working?</li> <li><input type="checkbox"/> What's one way I could support you more?</li> <li><input type="checkbox"/> What's one way we could work better together?</li> <li><input type="checkbox"/> What's one thing I can do to grow in my position?</li> </ul>	
<p>4. MANAGER ~1 minute</p>	<p><b>MANAGER'S PERSPECTIVE:</b></p> <ol style="list-style-type: none"> <li>1. What's gone well, employee contributions and their impact.</li> <li>2. What's next to focus on.</li> <li>3. Other topic ideas:</li> </ol>	
<p>5. EMPLOYEE ~2 minutes</p>	<p><b>YOUR DEVELOPMENT: New skills and work interests. Check 1-2 questions you'd like your manager to ask you:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Is there a new skill you want to develop?</li> <li><input type="checkbox"/> What's one of your skills you'd like to use more of?</li> <li><input type="checkbox"/> Are there any projects you want to be involved in?</li> <li><input type="checkbox"/> What on-the-job experience would help you progress?</li> </ul>	

WHO	TOPICS AND IDEAS FOR QUESTIONS	NOTES
6. MANAGER ~1 minute	<b>MANAGER SUPPORT</b> <b>Questions to ask your direct report:</b> <ol style="list-style-type: none"> <li>1. What's one thing I'm doing to support you that is working?</li> <li>2. What's one way I could support you more?</li> </ol>	
7. MANAGER AND EMPLOYEE ~1 minute	<b>WRAP UP &amp; ACTION ITEMS</b> Both: Agree on the biggest takeaways from the conversation. Identify next steps, such as follow-up items, action items, new goals, ideas for development, etc.	

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