**Employee Check-Ins – Line Manager Guide**

**Before the Meeting: Prepare**

Nothing is worse than going into a meeting with a manager that looks lost or like they’re not invested. Take 5 minutes to prepare before the meeting. Review the employee’s list of goals and projects to see if any are due or running off course.

* Make a note of important department or company changes that need to be discussed
* Review any feedback sent/received to identify any discussion points.
* Unplug from other activities so the employee knows they have your complete focus.

**During the Meeting: Possible Discussion Points**

The bonus of frequent check-ins with employees is that managers don’t need to open a fire hose in every meeting. They can select specific goals, projects, or coaching points to focus on in each meeting. Employees might also start the conversation and guide the focus (even better).

Generally, managers and employees should prioritise discussion points based on due dates and progress. What is discussed will change meeting-by-meeting.

**Employee Check-In Agenda/Discussion Points:**

* Get the employee talking!
* Use conversation starters to engage the employee in conversation
* Use open-ended questions to keep them talking
* Let the employee steer the conversation but make sure you discuss any important items
* Goal/Project updates
* Discuss the status of short-term goals and long-term projects
* Adjust/update existing goals with the employee
* Discuss any challenges or lessons learned
* Offer coaching and/or assistance for any roadblocks
* Discuss, if any, other priorities which might affect the goal progress
* Ensure all goals are still on track
* Acknowledge any milestones or accomplishments
* Discuss/confirm any new goals for the employee
* Recent accomplishments
* Acknowledge recent accomplishments and provide feedback
* Ask the employee for any recent accomplishments
* Status of Training/Learning
* Discuss any training items due/in progress
* Ask the employee if there are any training requests
* Ask if the employee feels they are getting enough feedback
* Ask if the employee is learning from peers/mentors or if they would like to recommend training items to improve skills and further career
* Discuss how training is/should be executed
* Company or team updates/news
* Discuss any important company/team updates or news
* Confirm any action items needed
* Employee ideas/requests for change
* Ask the employee for any ideas/input
* Discuss any areas needing change (company, team, project etc.)
* Ask the employee if your management style is effective for them and get suggestions for change
* Discuss any overall roadblocks or distractions that might be affecting the employee
* Employee career development
* Discuss employee’s career goals
* Discuss how you can work together to achieve their career goals
* Discuss opportunities and career paths for the employee
* Set clear expectations for any lateral/upward movement
* Plan for the week/month/quarter
* Review the priorities for the short and long term

**Conversation Starters: Keep Them Talking**

Some employees are more reluctant to speak up but this doesn’t mean that a manager should do the bulk of the talking. There are simple ways to get the employee to talk and keep talking during the check-in meeting. Remember this meeting is about them, the more they talk, the better.

Here are some open-ended questions to get employees talking:

* Tell me about your week/month – what’s it been like?
* Tell me about what you’ve been working on.
* Where do you think I can be most helpful?
* Are you on track to meet the deadline?
* What areas are ahead of schedule?
* What questions do you have about this responsibility or project?
* How are you going to approach this?
* What have you learned about this area of responsibility, or project?
* What didn’t go as you had hoped? Why?
* What can you/we do differently next time?
* What suggestions do you have?

Here are some tried and true conversation starters to keep employees talking:

* “Go on…..”
* “Tell me more…”
* “Why do you say that...”
* “How do you mean…”
* “Can you give me an example…”
* “What else…”

**At the End of the Meeting**: **Summarise**

Before the employee leaves the meeting, summarise the key discussion points for a few moments. This will help remind employees of any action items and reinforce any acknowledgement or coaching tips provided. Ask the employee if anything was missed and remind them when the next meeting will be.

**After the Meeting: Document**

This very small but significant step is often skipped and can make a big difference. Take 5 minutes after each meeting to record key discussion points, action items or feedback. This will help kick-start the next meeting and serve as a helpful reminder when managers are looking at trends in performance. Keep these notes in a central location/online.

**How Did You Do?**

Take a few moments after each meeting to evaluate how you did. Even the best managers should strive to improve their communication and meeting skills.

* Did you talk too much/not enough?
* Did you actively listen?
* Did you ask questions?
* Did you acknowledge the employee’s feelings?
* Did you paraphrase key items to confirm understanding?
* Did you provide effective coaching tips?
* Were you distracted in the meeting?
* Do you feel the meeting was valuable?
* Did you discuss all important points?
* What could you do to improve the next meeting?

Overall, frequent check-ins with employees are a must to ensure clarity, provide coaching, and offer the support needed for an employee to succeed. Although finding time in the day is a challenge for many managers, check-ins are time well spent and will pay dividends in the long run for both the manager, the employee, the team and the company.