



Check-Ins

Workplace & Social Engagement

What to Expect from a Check-In Session.

Outcomes

- An understanding of what a check-in is.
- Awareness of Team Member and Team Leader responsibilities.

What to Expect from a Check-In Session

Check-ins are frequent, future-focussed conversations about work priorities and outcomes, strengths, performance and development. Having regular check-in sessions drives team engagement and enhances development. Detail what your team can expect from a check-in session and why it is important.

This how to guide article will cover:

- What a check-in session is.
- Topics to cover in check-in session.
- Responsibilities of Team Members and Team Leaders.

Check-Ins

Check-ins are frequent and meaningful conversations between a team member and a team leader about specific work with a forward-looking focus. Having regular check-ins drives team engagement, helping your team member feel a part of and contributing to a successful team.

Check-in conversations should take place on a recommended fortnightly basis, but some team members may require more or less frequent check-ins depending on their needs and the nature of the work. Even in small teams, or for roles that are for a short duration of time, Check-ins are really important to make sure that Team Members are aware of what they need to do and how they are performing.

Check-ins will focus on specific pieces of work / engagements and what is required of the Team Member in their immediate role in the team and/or engagement. This will mean different things at various times, but could include:

- **Status of the Work** – general/specific updates. Communication of upcoming priorities to ensure the Team Member's focus is right. This ensures there is a shared understanding of role expectations.
- **Roadblocks** – update on impediments to completing a piece of work / performing a role as expected and how the Team Leader can help clear the roadblock.
- **Performance** – input on what is going well, what is not going well, behaviours observed, and actionable steps a Team Member can take in the future in the context of a specific piece of work / engagement. This is where a Team Member can ask about their performance (in the context of specific examples from the engagement) and how it has translated into Performance Snapshots.
- **Wellbeing** – efforts to accommodate the individual's work / life needs, noting that this may be discussed with the Team Member's Coach in the first instance. These span across areas such as email responsiveness, annual leave, sick days, flexible work arrangements, personal health and wellness goals etc. and how these may impact delivery / performance.
- **Strengths** – understanding a Team Member's strengths as highlighted in specific work completed for the Team Leader and / or others and identifying opportunities to align future work or build excellence in that area.
- **Course Correction** – help get Team Members back on track when necessary, including discussion of what was not working.

Team Member

As a Team Member, you play a significant role in the success of your team and the business. Everyone at the company is a Team Member. As a Team Member you are responsible for scheduling check-in sessions with your Team Leader. Prior to the check-in you should have an idea of what you want to discuss i.e. how your current work is going, where you see opportunities for improvement, how your Team Leader can assist, and any areas of concern / barriers.

Team Members are responsible for:

- Owning your own development, goals, and growth with support from your Team Leader and Coach.
- Identifying your strengths, looking for opportunities to develop and use them.
- Initiating and conducting regular Check-In conversations with your Team Leader.
- Requesting Performance Snapshot from your Team Leader.

Receiving Feedback

Constant communication and ongoing feedback are the hallmark of well-functioning and high performing individuals and teams. Check-ins offer an opportunity for Team Members to gather feedback from their Team Leader regarding their performance, development, growth etc. By being open and responding well to feedback, you position yourself to receive more feedback, creating a positive feedback loop of growth and performance improvement.

Tips for Receiving Feedback:

Before Check-In	During Check-In	After Check-In
<ul style="list-style-type: none"> • Be open and receptive to feedback. • Connect with your Coach if you need help to prepare. • Be aware of your preconceptions going into a Check-In. 	<ul style="list-style-type: none"> • Be curious, collaborative, not judgmental. • Be aware of your non-verbal responses. • Understand the feedback before responding. • Ask for clarification / examples, if needed. • Paraphrase feedback (demonstrates you have understood and are actively listening). 	<ul style="list-style-type: none"> • Take time to reflect on feedback. • Follow-up with your Coach if you think they can help you interpret the feedback better. • Request Performance Snapshot, where applicable.

Team Leader

The Team Leader is the direct supervisor leading the Team Member's work and is best positioned to evaluate day-to-day performance. A Team Leader is responsible for delivering feedback to Team Members, managing a team's performance, and providing performance snapshots so that we have consistent performance data.

As a Team Leader, you will have frequent conversations with your Team Members to talk about work, clarify what is expected in the immediate future, and help them figure out how play to their strengths. So, it is important that the Team Member is clear about who the Team Leader is for every engagement or project including scenarios where a Team Member will be working on multiple jobs.

Team Leaders are responsible for:

- Providing real-time, consistent, and candid feedback to their Team Members.
- Reviewing, approving, and having direct line of sight into a Team Member's day-to-day work.
- Helping a Team Member prioritise their work.
- Creating opportunities for Team Members to play to their strengths.
- Helping a Team Member set project / engagement goals and communicate expectations.
- Providing clarity on outcomes.
- Removing roadblocks that are in the way of achieving good outcomes.
- Leveraging the diversity of thinking within your team to make smart & innovative decisions.