

MANAGER'S Check-in checklist

Get the most out of your catch ups ✓

Actions & talking points

☐ Cross off actions as you go.  Use talking points to help steer your conversations.

Before the meeting...

- ☐ Catch up with any emails and messages from your employee
- ☐ Review your employees priorities, tasks and projects
- ☐ Review notes from your previous check-in
- ☐ Note down any feedback you want to give
- ☐ Note down any important company updates

Getting started

-  "How was your week?"
-  "What have you been working on?"
-  "Do you need help with anything?"
-  "Is there anything on your mind you'd like to share with me?"



Don't cancel meetings!

When you cancel or reschedule check-ins with your employees, it can look like you don't think they're important. Try to reserve time to catch up with your team on a regular basis.

Managers who check in with their team
regularly see almost 3x employee engagement!



Tasks and projects

- ☐ Discuss the status of short-term tasks and long-term projects
- ☐ Adjust and update goals if necessary
- ☐ Discuss any challenges and roadblocks
- ☐ Acknowledge and celebrate milestones

-  “What progress have you made since our last check in?”
-  “What are your top priorities for the week?”
-  “Is anything blocking you from hitting the deadline?”
-  “How do you feel about your current workload?”
-  “Is there anything we can do to support your progress?”

Company updates

- ☐ Discuss any relevant company news your employee might not know
- ☐ Make space for your employee to ask follow-up questions
- ☐ Confirm if there’s any actions your employee needs to take



Sharing relevant company updates (even bad news) can help your employees feel in the loop – and prevent false rumours from spreading.

Learning and development

- ☐ Check if your employee has any training requests
- ☐ Ask for updates about any ongoing courses
- ☐ Check if your employee is getting value from their training

-  “What have you learned recently that you enjoyed?”
-  “What would improve your training?”
-  “What resources would help you do your job?”

Career progression

- ☐ Check your employees progress against their career goals
- ☐ Discuss any relevant opportunities and career paths
- ☐ Identify any missing skills and training
- ☐ Set tasks and progression goals

- “What do you want to get out of your career over the next few years?”
- “Is there anything I can do to help you progress?”
- “What’s blocking your progress right now?”

Feedback

- ☐ Ask your employee if they have any ideas for how your team or the company can improve
- ☐ Get feedback on your management
- ☐ Identify any blockers

- “What would improve how our team works together?”
- “Are you facing any roadblocks at the moment?”
- “How could I make my management style more effective?”

Review and summarise

- ☐ Summarise what you’ve discussed during the meeting
- ☐ Agree on any goals for your employee
- ☐ Set expectations for your next check in
- ☐ Share your summary with your employee after the meeting ends

