

# Ongoing Check-Ins

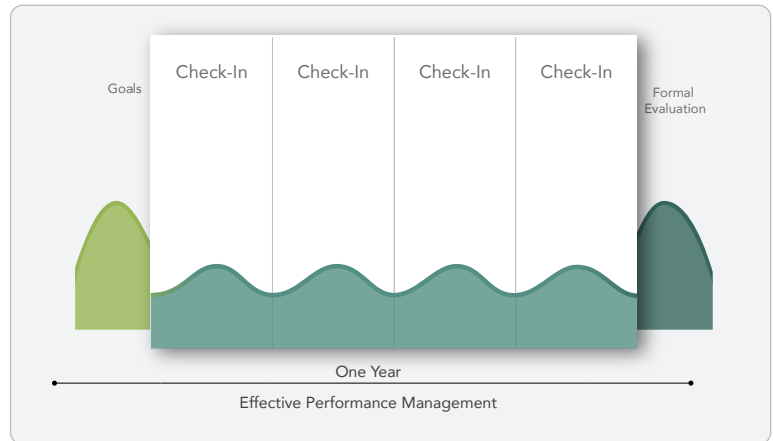
## What are check-ins and why set them?

Check-ins are regular discussions that happen throughout the year to:

- Check in on progress toward goals,
- Stay aligned on current projects,
- Discuss what is going well and what could be better, and
- Agree on next steps.

Ongoing check-ins promote progress toward goals by providing opportunities for feedback and support.

Having regular meaningful conversations is key to on-the-job learning which is the single most important way people improve and grow at work.



*Effective performance management requires regular check-ins as work progresses.*

## How do I conduct ongoing check-ins?

The ideal frequency of check-in discussions depends upon the work, the person, and any local practices. For most roles, ongoing check-in conversations around goals should happen at least quarterly, and they can be as short as 15 minutes. Note that if you meet more often to discuss day-to-day work and development, you can incorporate goal conversations into your existing meetings. Use your judgment regarding what will best support the performance and development of each person you supervise.

### 01

#### DISCUSS ROLES AND RESPONSIBILITIES FOR CHECK-INS

Discuss expectations for what you, the supervisor, and your direct report are each responsible for. A good time to do this is at the beginning of the performance cycle, once the annual goals are set and revisit as needed. If one or both of you are not taking ownership for your role in check-ins, this is an important place to start your next check-in conversation.

##### Your role as a supervisor

- Clarify the purpose and frequency of the check-ins
- Define what success looks like
- Clarify how employee's work contributes to the big picture
- Bring goals and expectations for both results and behaviors into regular feedback and coaching conversations

##### Your direct report's role

- Ask questions
- Be proactive when work seems misaligned with broader goals
- Seek, accept, and act on feedback
- Take ownership of their own career and development - set goals, seek opportunities, ask for guidance when needed

**!** Be clear with the employee about their role in check-ins. If the person is not doing their part, address this directly, otherwise your efforts will be wasted. A common trap for supervisors is to take on responsibility for the employee's role.

# Ongoing Check-Ins (Cont.)

## 02

### REVIEW AND UPDATE GOALS

Ongoing check-ins by design are centered on goals.

#### Start the conversation by reviewing goals:

- Discuss updates, which could include progress since last conversation, changes to resources or timelines that impact the goal, additional information or questions.
- As a supervisor, be sure to re-affirm and discuss how individual projects and assignments fit into the bigger picture. When people understand how their efforts contribute to serve a bigger purpose, they will be more motivated and engaged in their work.

If priorities shifted, set new goals\* or update existing goals to reflect the change. Discuss the following questions:

- How does this project or assignment fit into the employee's annual goals? If it does not, discuss why it makes sense for this person to take on this project or assignment.
- What does success look like with regard to the goals?
- What behavioral competencies\*\* will be most important for success?



\* See the *Quick Guide to Goal Setting* for steps and best practices on setting up goals.

\*\* Need more information on behavioral competencies? Go to [z.umn.edu/competencies](http://z.umn.edu/competencies) to learn more about the competency model developed at the University of Minnesota to support talent development discussions.

## 03

### EVALUATE CURRENT PROGRESS AND PROVIDE COMMENTS TO SUPPORT PERFORMANCE AND DEVELOPMENT

Discuss and evaluate progress toward goals; this does not need to be a formal assessment. Provide feedback about the goals based on your observations, feedback from others, and the updates that the employee has shared.

#### Provide at least two comments to reinforce and/or redirect the employee progress:

- What did the employee do well to advance goals?
- What are the two things that employee needs to do more or less of to help achieve the goals?

#### Is your feedback and coaching effective\*?

- Consider the person's level of SELF-AWARENESS and MOTIVATION to learn from feedback and coaching. If they are not self-aware or motivated, address this first.
- Consider whether feedback will be effective at this point in time. If yes, give feedback to help the person understand the SITUATION, their BEHAVIOR, and the IMPACT of their behavior. Be sure to take every opportunity to provide positive feedback and recognize good work, it is a powerful way to reinforce effective behaviors and to motivate higher performance.
- Consider whether NEW SKILL TRAINING would be helpful.
- Provide opportunity for REFLECTION - what is going well? What can be done better?
- Discuss OPPORTUNITIES for the person TO APPLY AND MASTER THE SKILLS through the project and assignments they are working on.

\* This list is an excerpt from the *Quick Guide to Feedback* and the *Quick Guide to Coaching* available on [supervising.umn.edu](http://supervising.umn.edu). See the full guides for more information on coaching steps and questions to ask when determining the best way to support and coach employees.

# Ongoing Check-Ins (Cont.)

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## 04

### DETERMINE NEXT STEPS

**Determine**

What do they need to support them in this work (additional information, resources, skills, training, opportunities to practice, etc.)?

**Discuss**

Agree on next steps for the work, for the person's development, and for your future check-ins:

- What are the person's next steps and when will these next steps be taken?
- What are your next steps as their supervisor and when will you take them?

This can be a simple conversation or a more detailed, formal process. Consider what makes the most sense for the work, for the individual, and what practices and expectations exist within your college, campus, or unit.

**Document**

Take a note of this information as reference for future check-ins, especially since it will help inform the formal evaluation at the end of the year: updated goals, summary of progress and next steps.