



# WORKDOVE

Formerly Performance Culture

## How to Make Manager & Employee Check-Ins Effective

# Who Am I?



**Melissa Phillippi**  
CEO & Co-Founder

Co-founded WorkDove (formerly Performance Culture) in 2015. Leaning on years of coaching and training business owners, HR Leaders, and their staff, Melissa partners with the WorkDove team to create meaningful workflows and performance management apps that work.

# Why Talk About This?

COVID-19

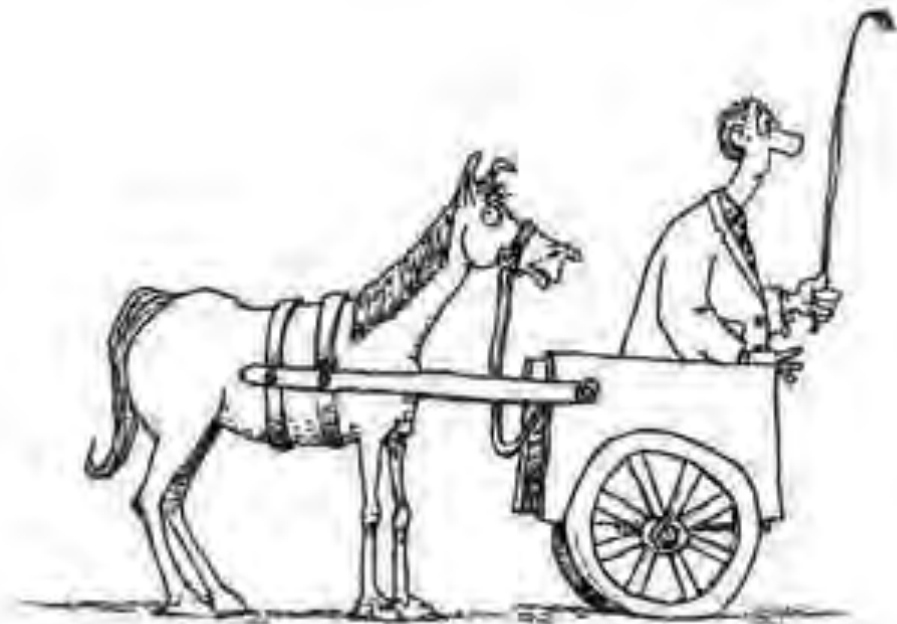
Great Resignation

Great Reshuffle

# Check-Ins are Foundational in Performance Management

Strong Foundation

Cart Before the Horse



CONNECTED

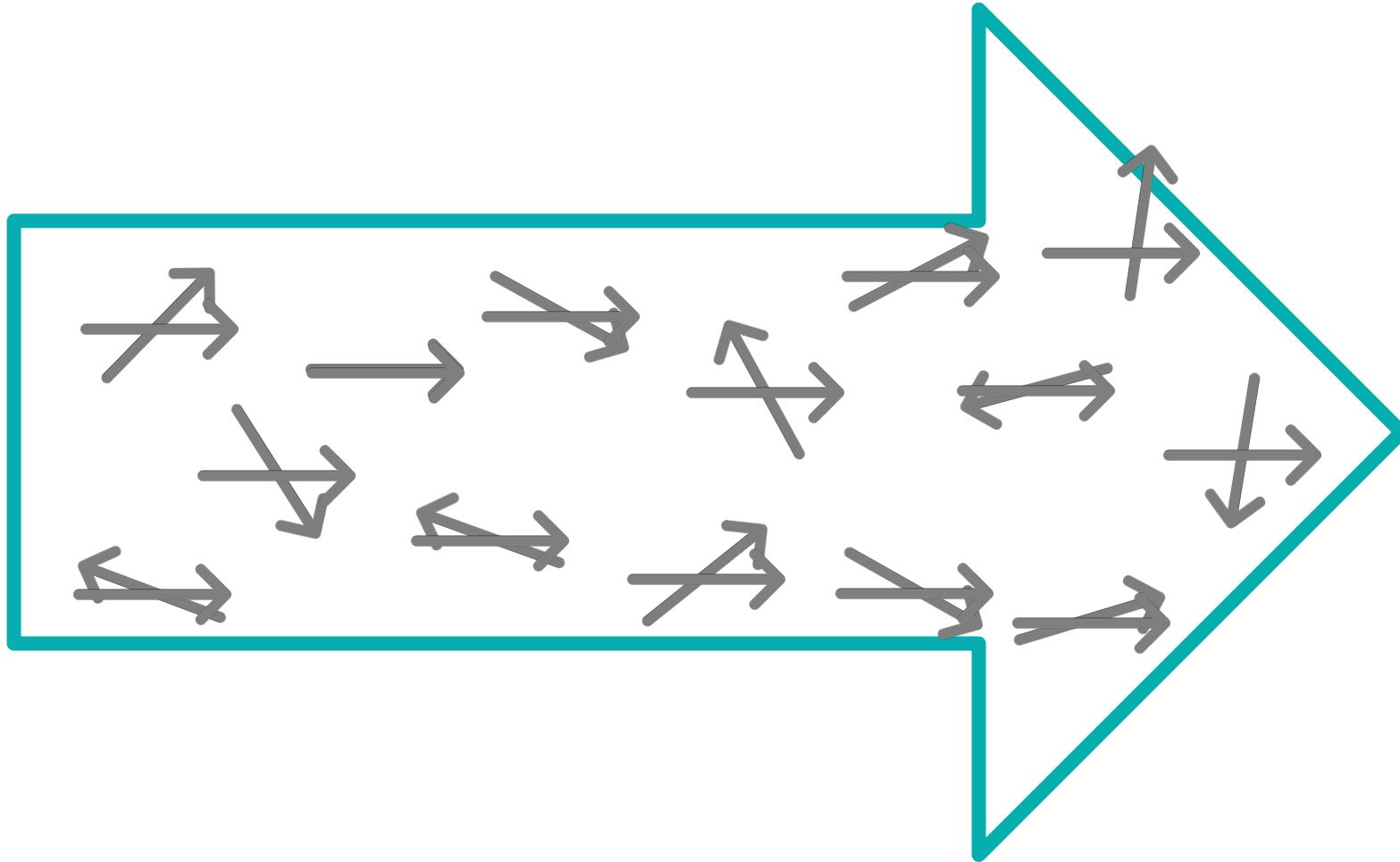
HEARD

CLEAR

UNDERSTAND

MATTERS

# Alignment



# Defining Check-Ins

## What are Check-ins?

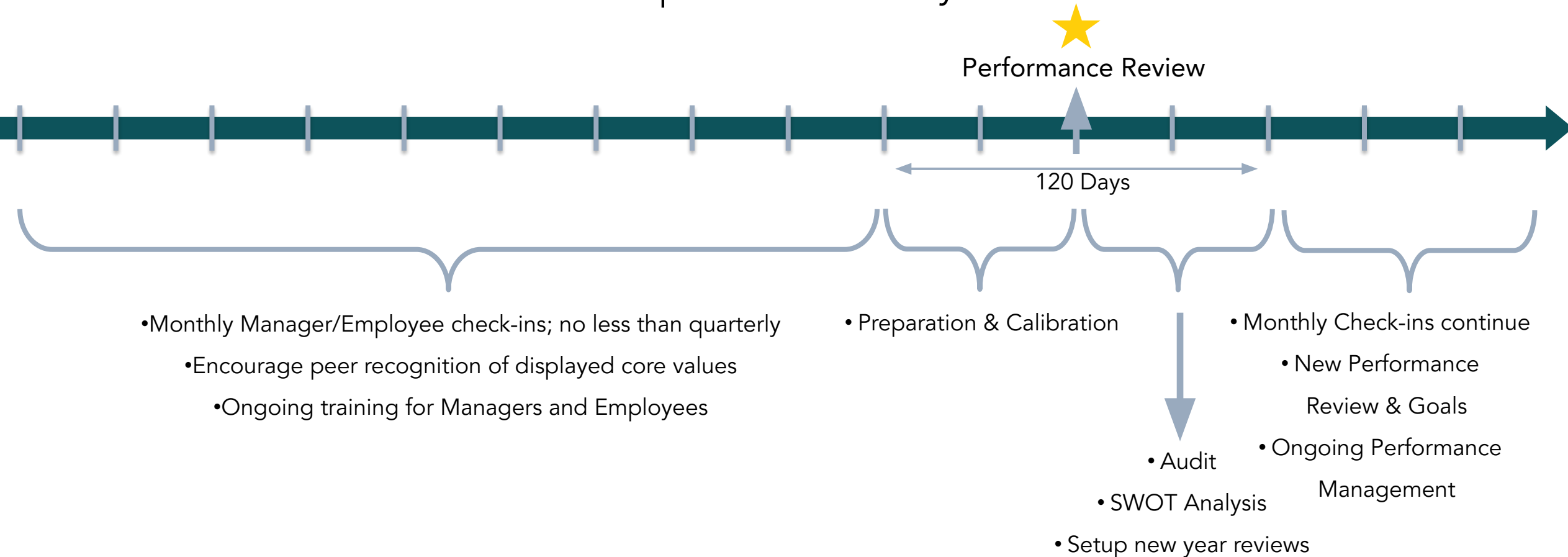
- ✓ INTENTIONAL times for Managers and Employees.
- ✓ AGENDA-DRIVEN, prepared, 15 to 30 minute meetings.
- ✓ COACHING sessions, hitting HIGHLIGHTS.

## What Check-ins are NOT:

- ⊘ PERFORMANCE REVIEWS.  
*Who wants to do more of these every year??*
- ⊘ Tasks lists/huddles/prioritization meetings. Does not replace weekly stand-ups or daily huddles.
- ⊘ Informal, “shooting from the hip” meetings.

# Logistics: How Often?

## Sample 12-Month Cycle



# Sample 12-Month Performance Management Calendar

## JAN

- Performance Review/review last year's performance
- Goal Setting for new year

## FEB

- Goal updating or progress discussion
- Second Check-in

## MAR

- Check-in

## APR

- Check-in; Maybe Q1 Goal update discussion

## MAY

- Check-in

## JUN

- Check-in

## JUL

- Semi-Year Check-in; Mid-way point Goal Update discussion

## AUG

- Check-in

## SEP

- Check-in

## OCT

- Check-in; Maybe Q3 Goal update discussion

## NOV

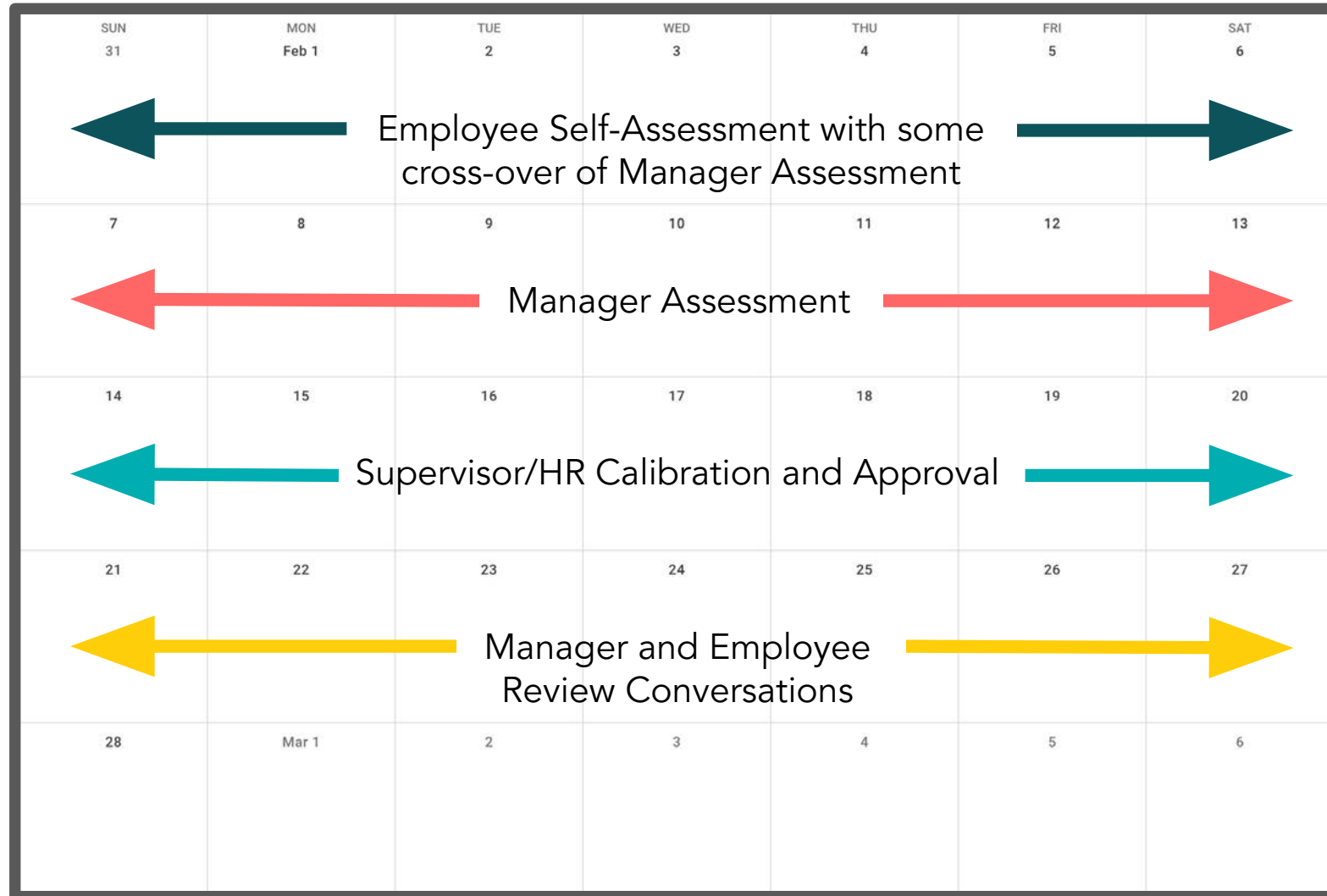
- Check-in

## DEC

- Check-in
- Request Peer/360 Degree Feedback
- Have goals finalized/updated



# Performance Review "Month"

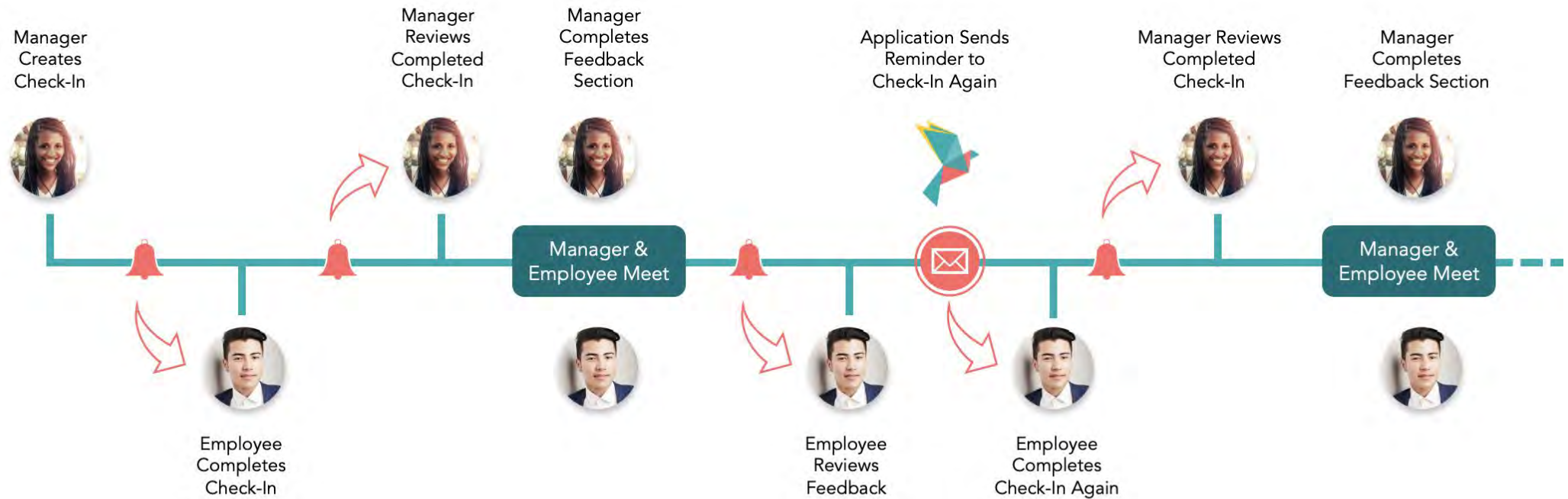


# Logistics: How?



WORKDOVE

## Check-In Workflow



Free Giveaway Time!

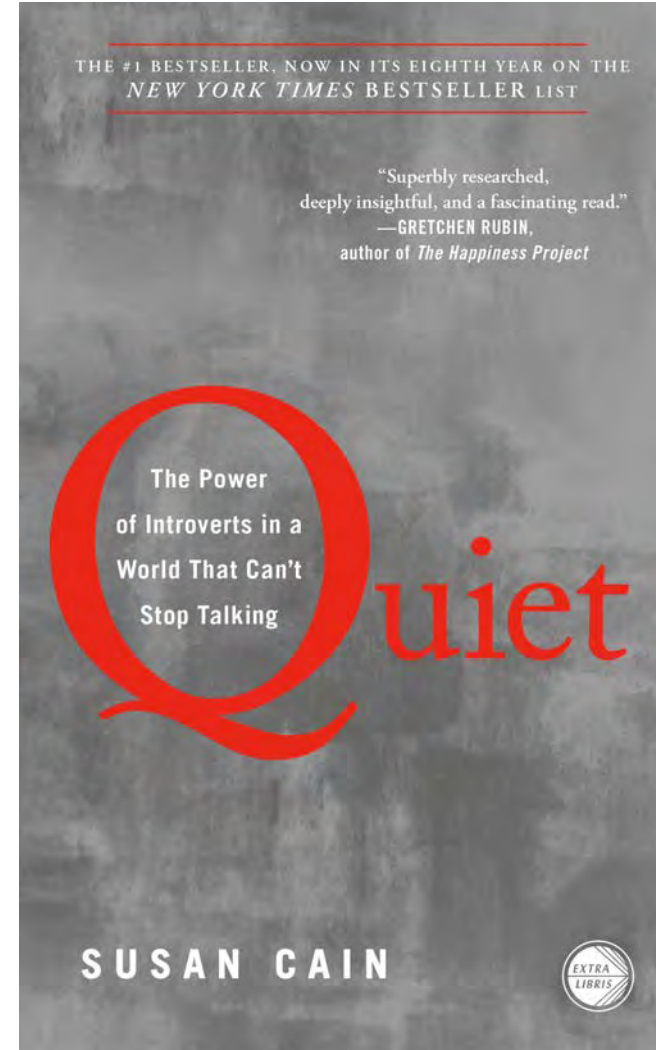
Email [hello@performanceculture.com](mailto:hello@performanceculture.com) for your Check-In Workflow Diagram!

# Logistics: How?

Writing Forces Clarity

Introverts vs. Extroverts

Best brainstorming occurs when people have had time to prepare/think ahead.



Cain, Susan. *Quiet: The Power of Introverts in a World That Can't Stop Talking*. New York: Broadway Paperbacks, 2013.

# It's All in the Brain...

Frequent, agenda-driven (no surprise) meetings lead to:

Psychological Safety and Increased Creativity\*

"Happy" Chemicals like Dopamine, Serotonin, Oxytocin, and Endorphins.

Biases decrease!  
(See our past webinar!)\*\*



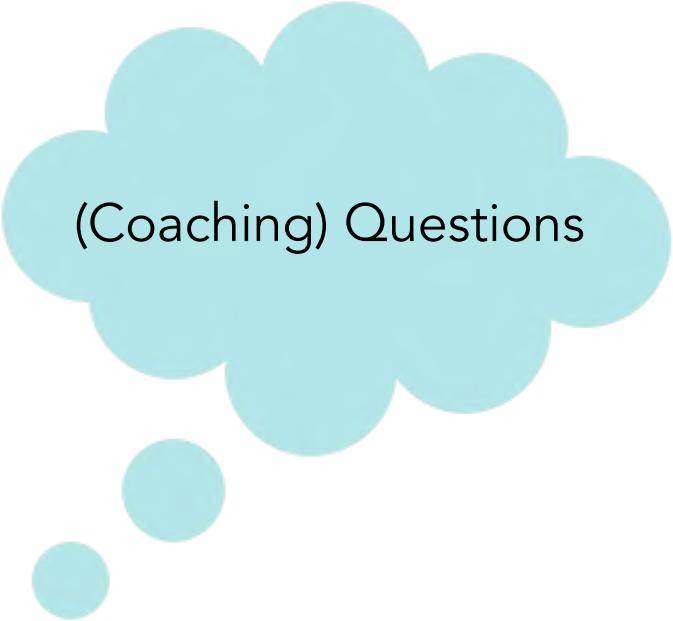
Trust - Not checking "up" on you; checking "in!"

More effective communication;  
Increased understanding.

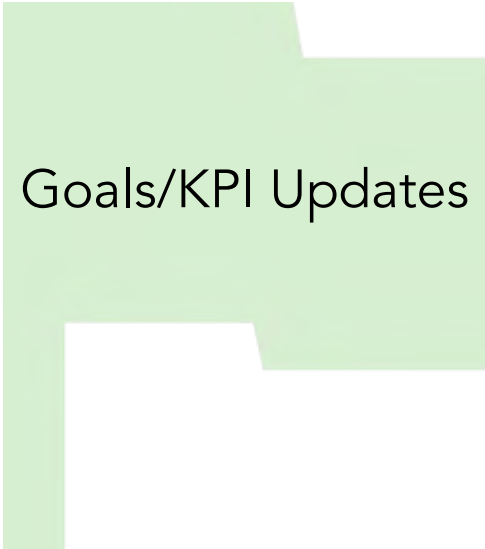
PEACE in the workplace!

# Logistics: What?

Great check-ins cover three main areas:



(Coaching) Questions



Goals/KPI Updates

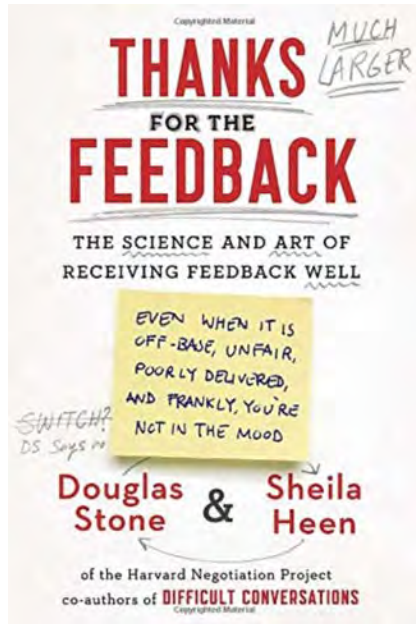


Behavior/Core Value  
Discussion

# Logistics: What?

## Sample Coaching Questions

Three forms of feedback...  
effective check-ins cover all three



Stone, D., & Heen, S. (2015). Thanks for the feedback. Portfolio Penguin.

1

What are your biggest accomplishments since our last check-in?  
What are you most proud of?

*Feedback type: Appreciation*

2

What are your top priorities for this upcoming check-in cycle?

*Feedback type: Coaching*

*What's more effective? Telling someone the answer, or helping them come to the answer on their own?*

3

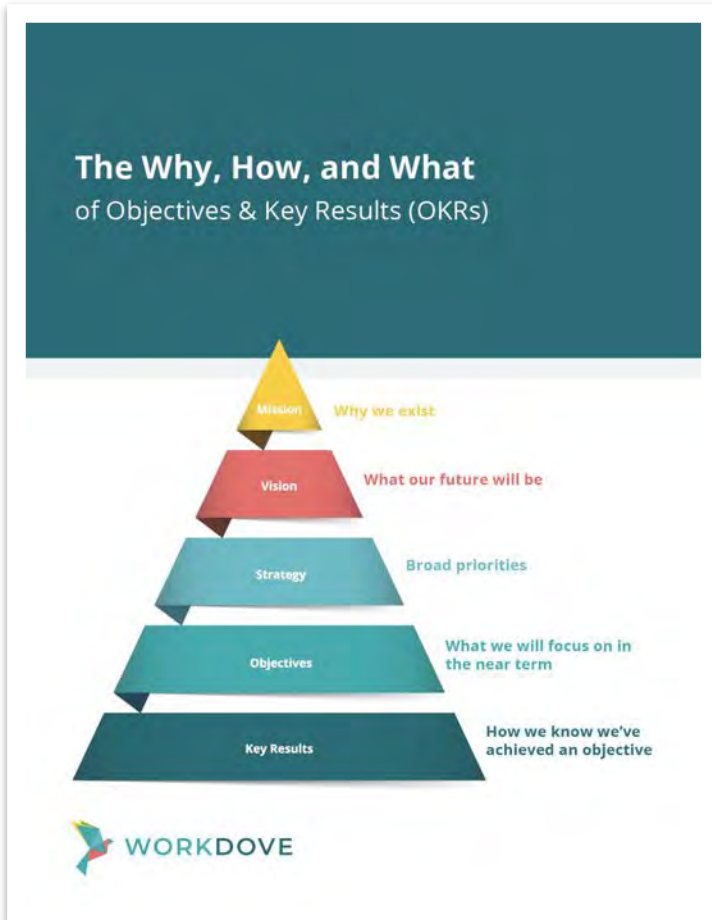
How can I best help you?

*Feedback type: Coaching (and helping you be a better Coach)*

*Consider refreshing this question from time to time with "What's ONE thing I should stop doing?" or "What's ONE thing I should do more of?"*

# Logistics: What?

## Goal/Progress Updates

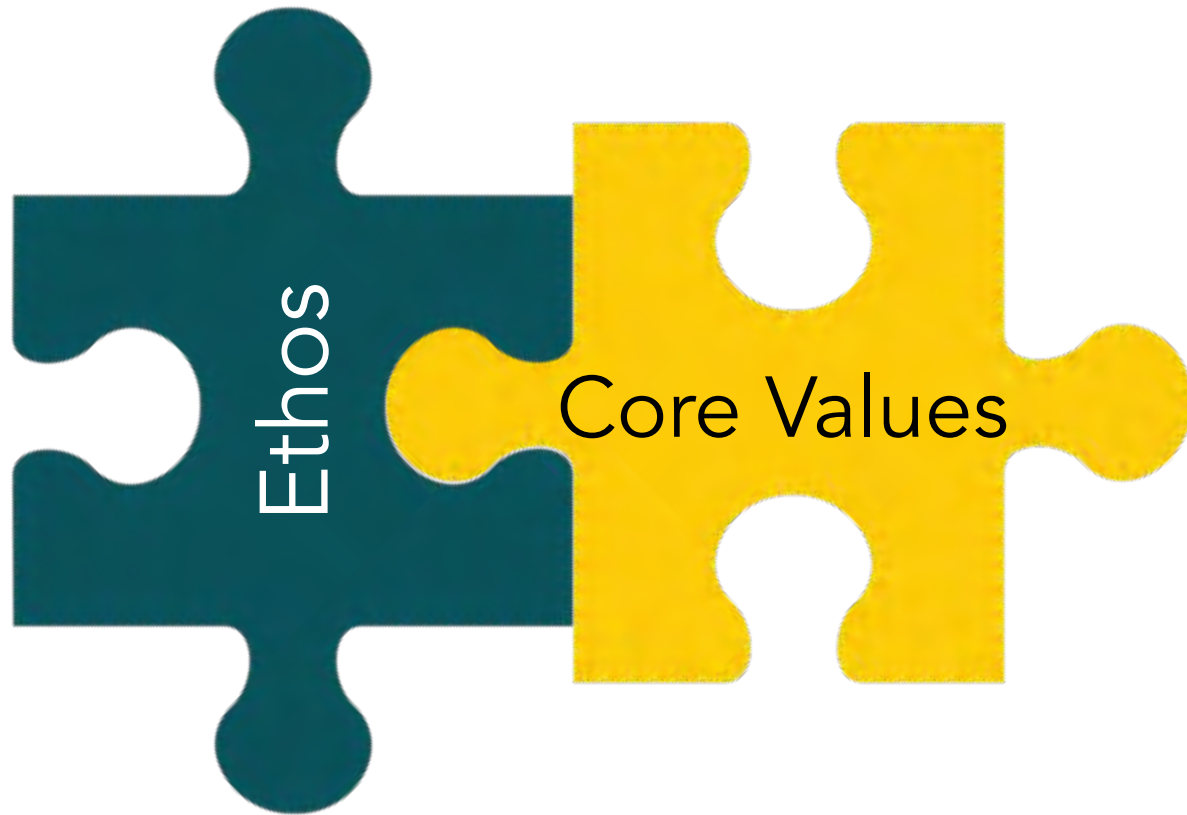


- List the employee's goals on the check-in agenda.
  - Employee updates the progress on each, staying high-level, and as metric-driven as possible. *(They must own their goals and their completion.)*
- Manager/Coach inspects and prepares any clarifying questions or assesses any help needed.

Email [hello@performanceculture.com](mailto:hello@performanceculture.com) for a copy of our OKR e-book!

# Logistics: What?

## Behavior/Core Value Discussion



“Operationalize” your Core Values by having your Employee answer:

How did you live out one or more of our core values this past check-in cycle?



# Free Check-In Template!

**Check-in Template**

Check-ins help managers and employees stay aligned and focused on priorities and provide a quick and easy way to communicate concerns, progress, and achievements. Check-ins provide the opportunity for frequent feedback making them an integral part of a coaching culture.

**Questions**

- 1 What are your biggest accomplishments since our last check-in? What are you most proud of?
- 2 What are your top priorities for this upcoming check-in cycle?
- 3 How can I best help you?
- 4
- 5

**Performance Objectives/Goals**

Performance Objectives/Goals are based on your most current performance review.  
WorkDove Reference Material: [performanceculture.com/performance-objectives/](https://performanceculture.com/performance-objectives/)

- 1
- 2
- 3
- 4
- 5

**Core Values/Behavior Competencies**

Core Values are based on your most current performance review.  
WorkDove Reference Material: [performanceculture.com/workplace-behavior/](https://performanceculture.com/workplace-behavior/)

- 1
- 2
- 3
- 4
- 5

Email [hello@performanceculture.com](mailto:hello@performanceculture.com) for your free Check-In Template

# Ease of WorkDove Check-Ins

## Viewing a Check-In

**Check-Ins for Allison Meyers** Close

Record Count: 25

Questions Objectives Core Values Goals 1 of 25 / 3 Jan 2022

**What were your accomplishments since the last Check-In?**

I reached my milestone 30th sale since joining the team, I am very proud of this accomplishment, and excited to continue challenging myself to newer heights.

**What are your key priorities?**

Monitoring the effectiveness of this new lead source by quantifying ROI on converted SQLs. Adjusting/tweaking as necessary to fine tune.

**How can I best help you?**

I could really use your guidance on setting up a proper sales channel in our CRM regarding organic growth. Can we please meet about this?

**How can I improve my communication with you?**

I think an area where we can all improve is to create agendas in this Performance Culture System for our meetings and track action items by person on it so we can have more effective meetings.

**Details**

**Manager Feedback** Last saved 01/03/22 11:22 am

Way to go on the milestone! We are very impressed.

Yes, let's set up a time to go over the sales channel. Find a time that works for you and I can make it work.

Thank you for the feedback on communication - I agree that the Agendas feature would contribute to more efficient meeting. I will look into it.

**Private Notes** Last saved 01/03/22 11:23 am

An area for manager feedback

# Ease of WorkDove Check-Ins

## Viewing a Check-In

Check-Ins for Allison Meyers Close

Record Count: 25

Questions Objectives **Core Values** Goals 1 of 25 / 3 Jan 2022

**Communication**  
Conveys information and ideas through a variety of media to individuals or groups in a manner that engages the audience and helps them understand and retain the message.

**Emotional Intelligence**  
Self-Awareness- Holds an understanding of own emotions and their effect on others; can realistically assess and talk about their strengths and weaknesses  
Self-Regulation- The ability to control or redirect disruptive impulses; trustworthy, able to suspend judgement, and open to change  
Motivation- A passion to work with energy and persistence for reasons beyond money or status; driven, goal-oriented, optimistic, and committed to the organization  
Empathy- Ability to understand the emotional needs of others and to treat them accordingly; develops and retains talent; managing cross-cultural sensitivities  
Social Skills- Proficiency in managing relationships, developing networks, building rapport, and finding common ground

**Employee Response**

This past month I've worked particularly hard on my communication skills, paying attention to my team and manager's DISC profiles, trying to adapt so we can best work together. It has been revealing to see how much better our team got along this past month when we've all shown more patience, understanding, and empathy.

**Details**

Manager Feedback Last saved 01/03/22 11:22 am

Private Notes Last saved 01/03/22 11:23 am

Alison has done a great job during this Check-In cycle.

An area for private notes

# How Check-Ins Tie Into Performance Reviews

**Self Assessment**  
Performance Review | 2022: 2022

Autosaved at 12:42:54pm Save & Close Submit

Objectives **Goals** Core Values Development Satisfaction Summary Approval

1. Average 150 to 200 new prospects per month Weight: 25% Details

**Employee Notes**

I have consistently averaged between 175 and 200 new prospects a month, thanks to the partnerships we have built with a couple high profile media outlets. The months in Q3 all averaged higher than 200 new prospects, and I was able to maintain that momentum into Q4. This increase in the second half of the year also led to a higher rate of qualifying calls.

2. Complete 30+ qualifying calls per week for a min of 300 per quarter Weight: 25% Details

**Employee Notes**

I consistently complete more than 30 qualifying calls per week, and saw a much higher rate in the second half of the year, with the increase in our number of prospects. I feel the quality of my calls increased throughout the year as well, as I honed in my high level pitch for our product.

**Check-Ins**

**Questions**

**What were your accomplishments since the last Check-In?**

I reached my milestone 30th sale since joining the team, I am very proud of this accomplishment, and excited to continue challenging myself to newer heights.

**What are your key priorities?**

Monitoring the effectiveness of this new lead source by quantifying ROI on converted SQLs. Adjusting/tweaking as necessary to fine tune.

**How can I best help you?**

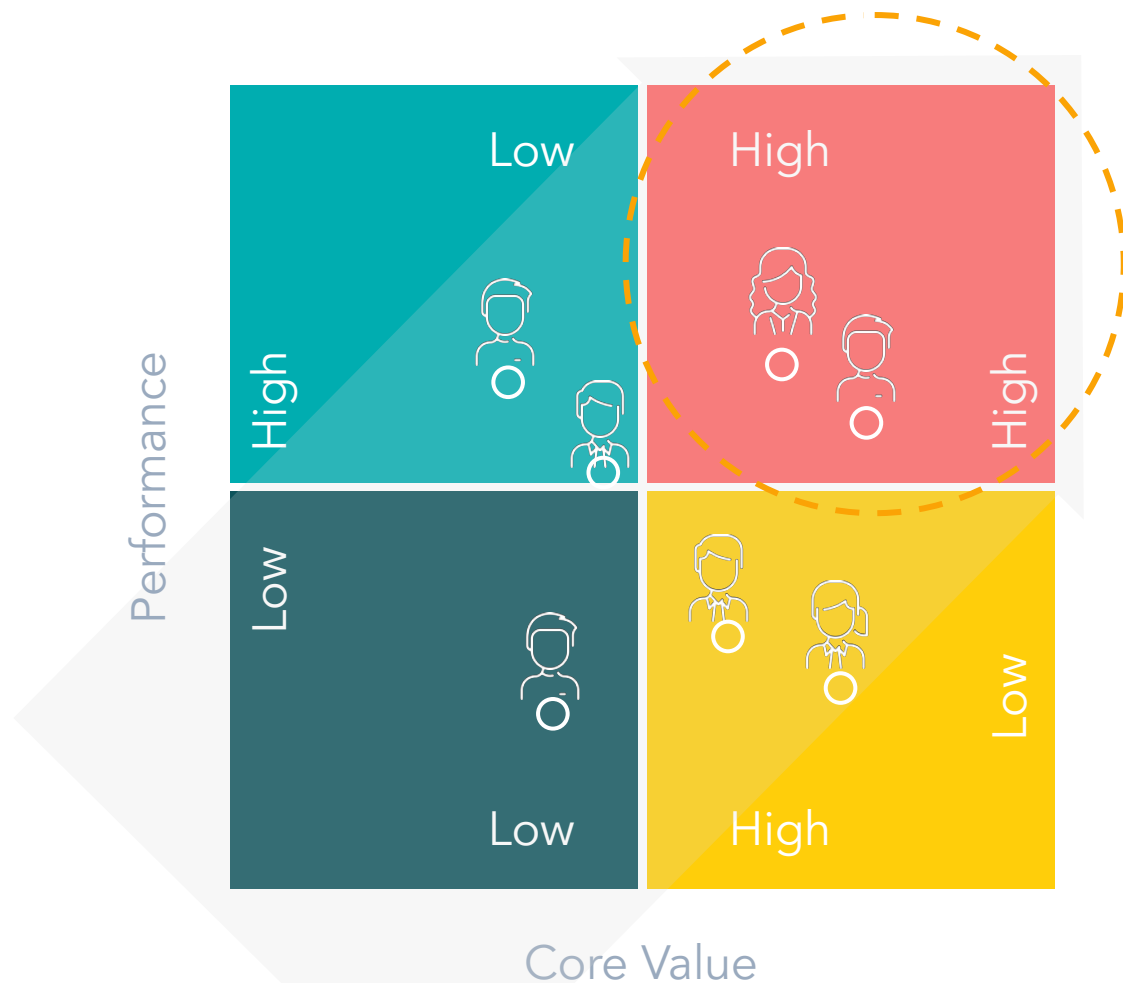
I could really use your guidance on setting up a proper sales channel in our CRM

Recognition

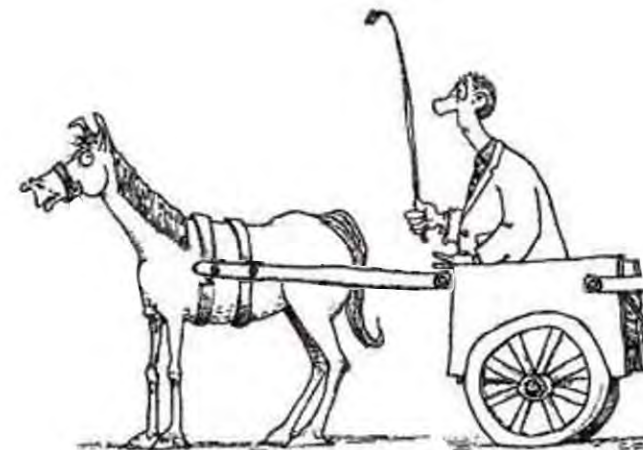
Integrated  
Check-Ins  
for ease  
of recall

# How Check-Ins Tie Into Performance Reviews

With more holistic employee data and frequent check-ins throughout the year, Managers can more accurately rate on performance vs. core value/culture fit.



Over time, historical data provides trend analysis and more objectivity (proof) for promotion, Leadership Succession, and/or 9-Box placements.





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## Thank You!

To learn more and request a deeper dive, email us at [Sales@PerformanceCulture.com](mailto:Sales@PerformanceCulture.com)