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.

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Why Talk About This?

Great Resignation

Great Reshuffle

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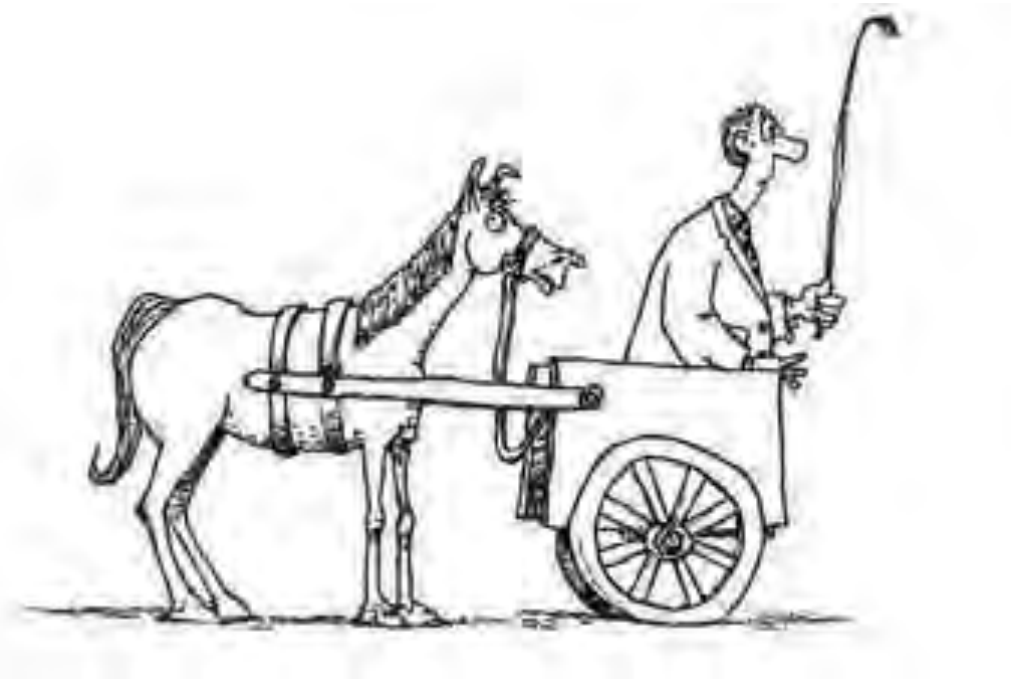
Check-Ins are Foundational in Performance Management

Strong Foundation

Cart Before the Horse



CONNECTED HEARD CLEAR UNDERSTAND MATTERS

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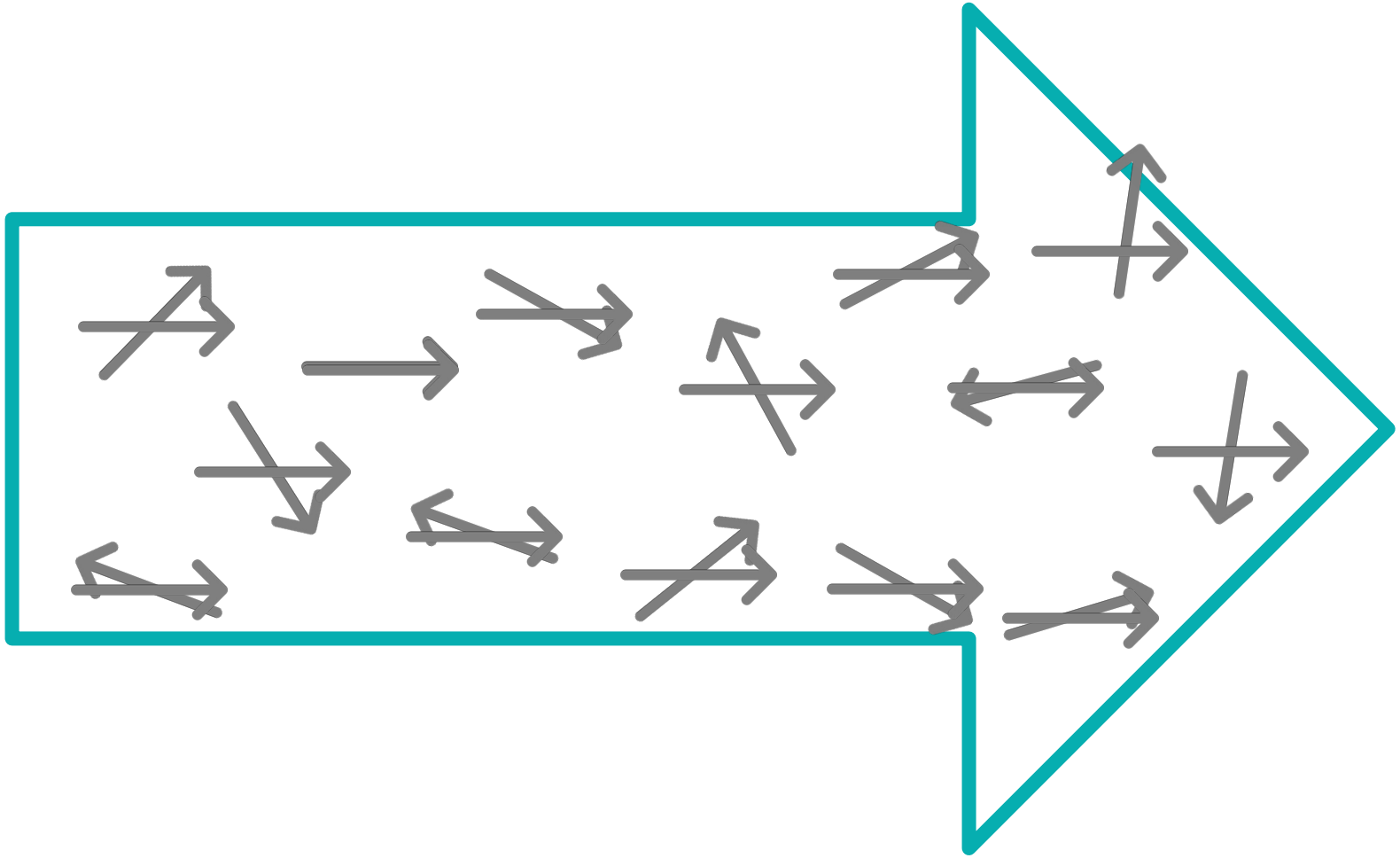
Alignment



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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.

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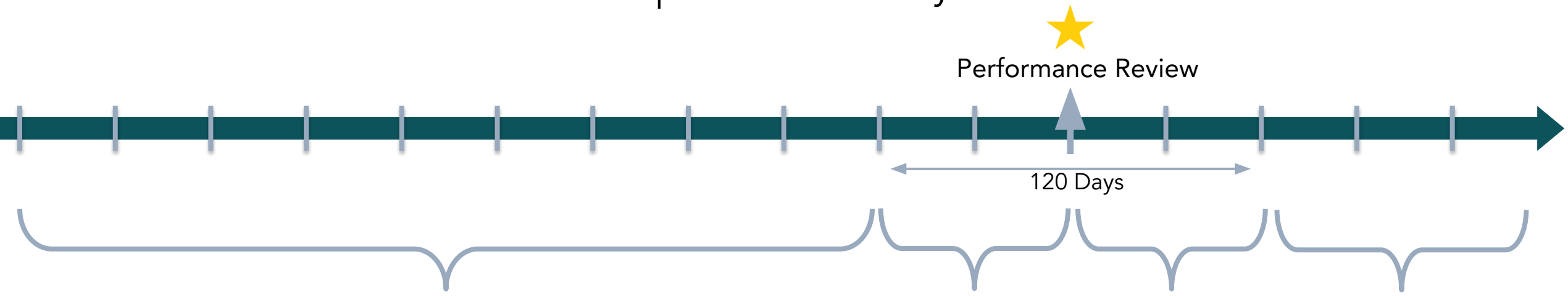
Logistics: How Often?

Sample 12-Month Cycle



- Monthly Manager/Employee check-ins; no less than quarterly
- Encourage peer recognition of displayed core values
- Ongoing training for Managers and Employees

- Preparation & Calibration

- Audit
- SWOT Analysis
- Setup new year reviews

- Monthly Check-ins continue
- New Performance Review & Goals
- Ongoing Performance Management

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View our previous webinar on Improving Consistency & Fairness and Reducing Rater Bias in Performance Reviews
https://performanceculture.com/improve-consistency-fairness-and-reduce-rater-bias-in-performance-reviews-copy

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

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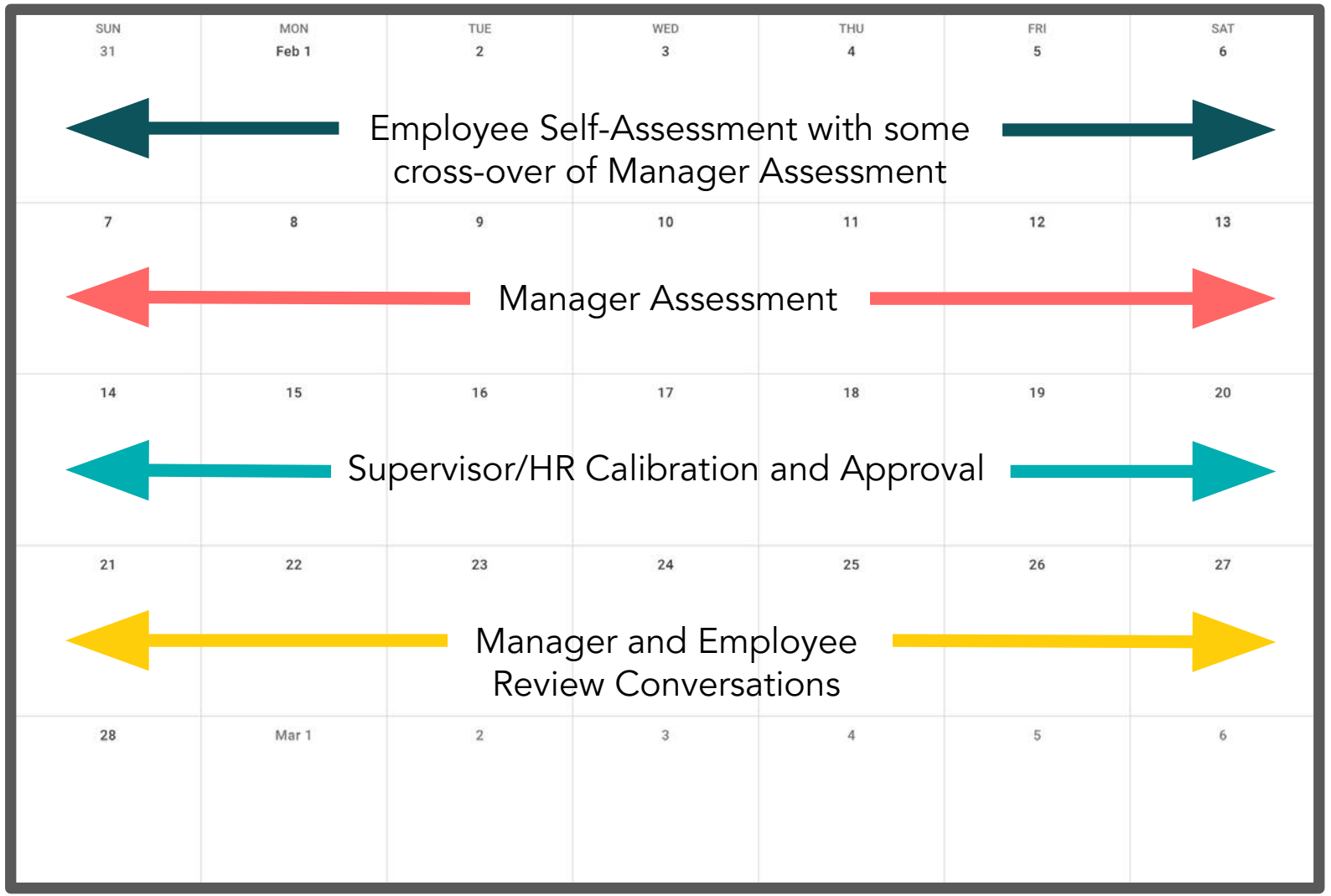
Performance Review "Month"



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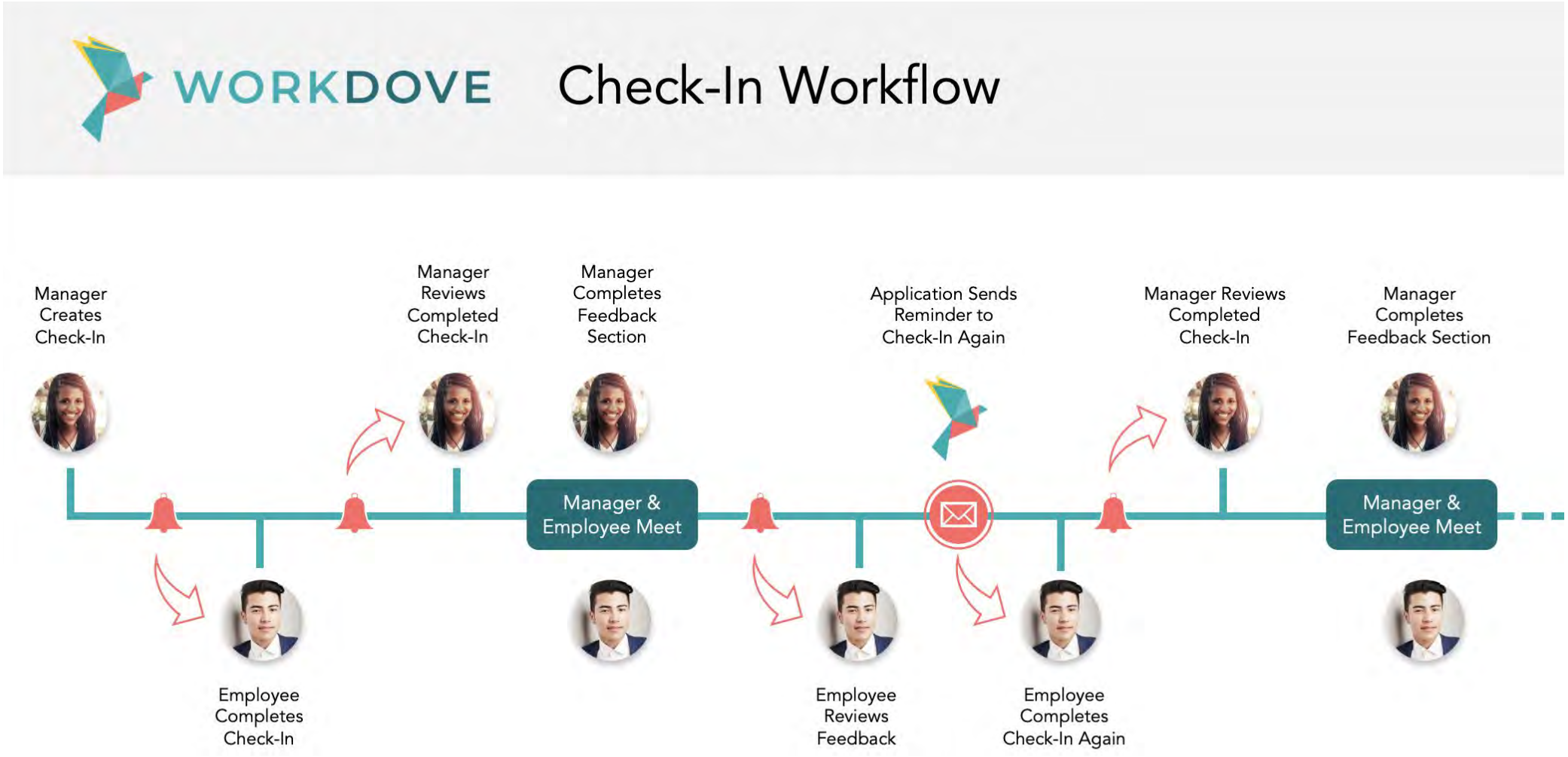
Logistics: How?



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Free Giveaway Time!

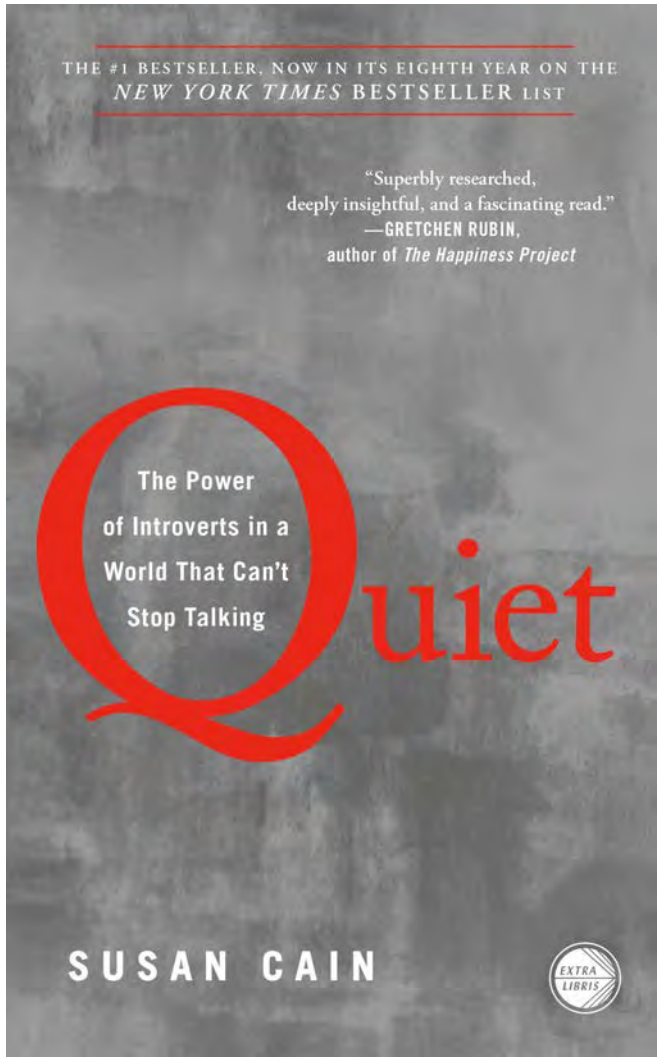
Email hello@performanceculture.com for your Check-In Workflow Diagram!

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.

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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!

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*https://www.oxford-group.com/insights/why-psychological-safety-key-creativity-and-innovation-workplace
**https://performanceculture.com/improve-consistency-fairness-and-reduce-rater-bias-in-performance-reviews-copy/

Logistics: What?

Great check-ins cover three main areas:

(Coaching) Questions

Goals/KPI Updates

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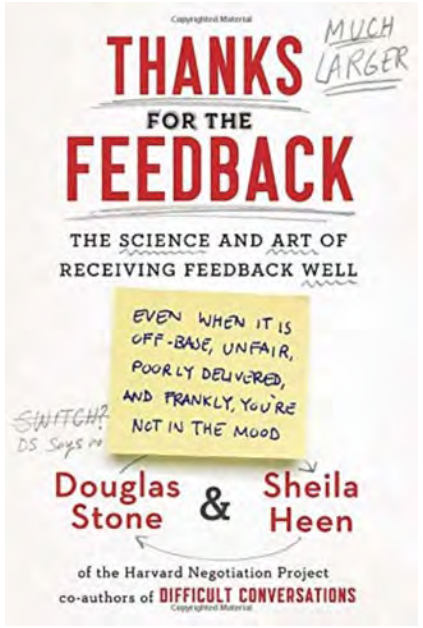
Logistics: What?

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?"

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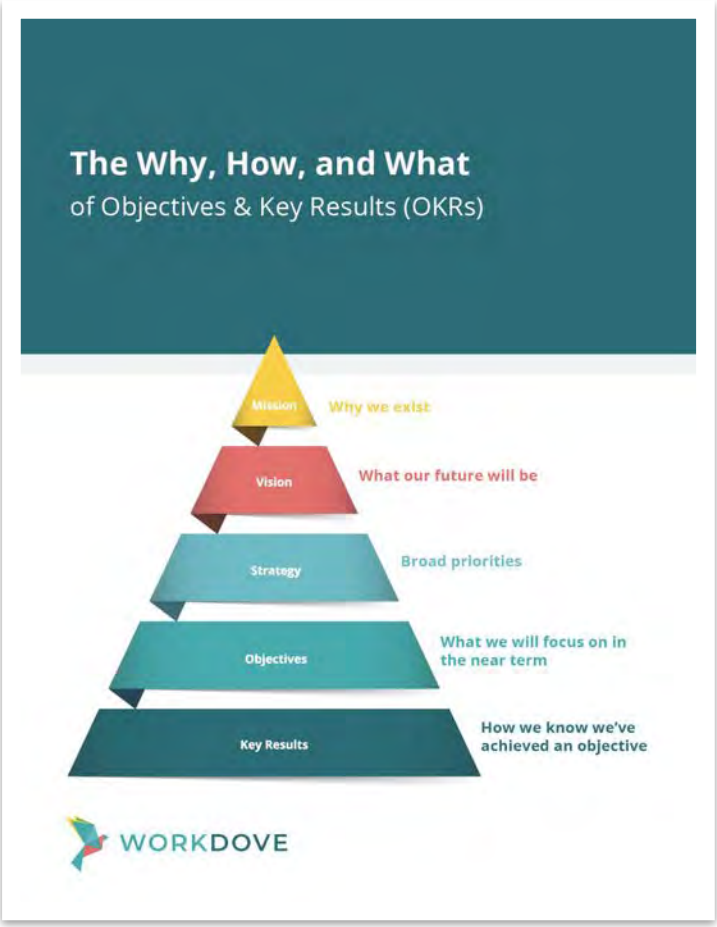
Logistics: What?

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 for a copy of our OKR e-book!

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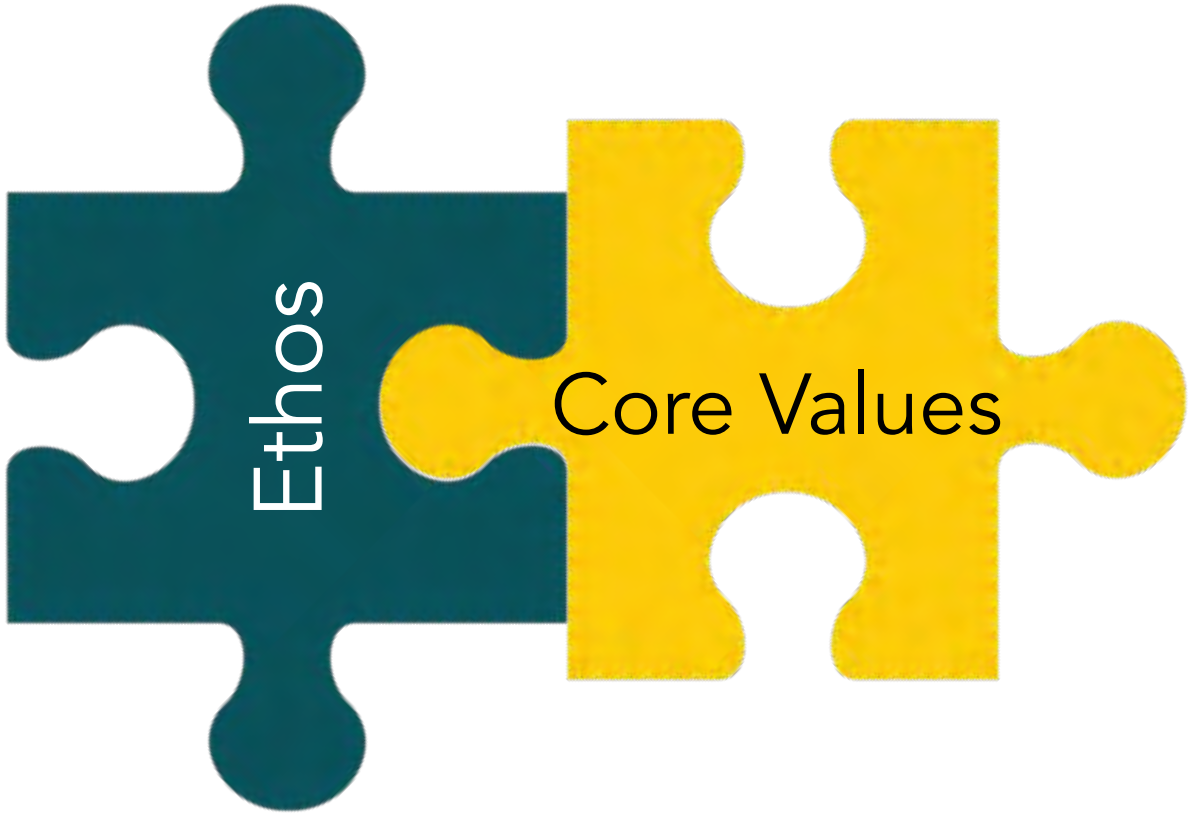
Logistics: What?

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?

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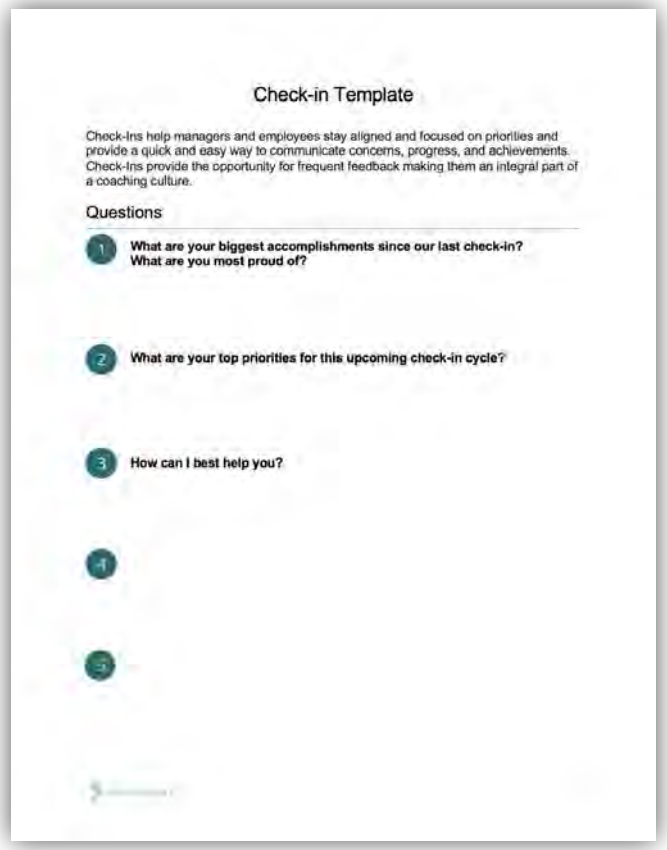
Free Check-In Template!

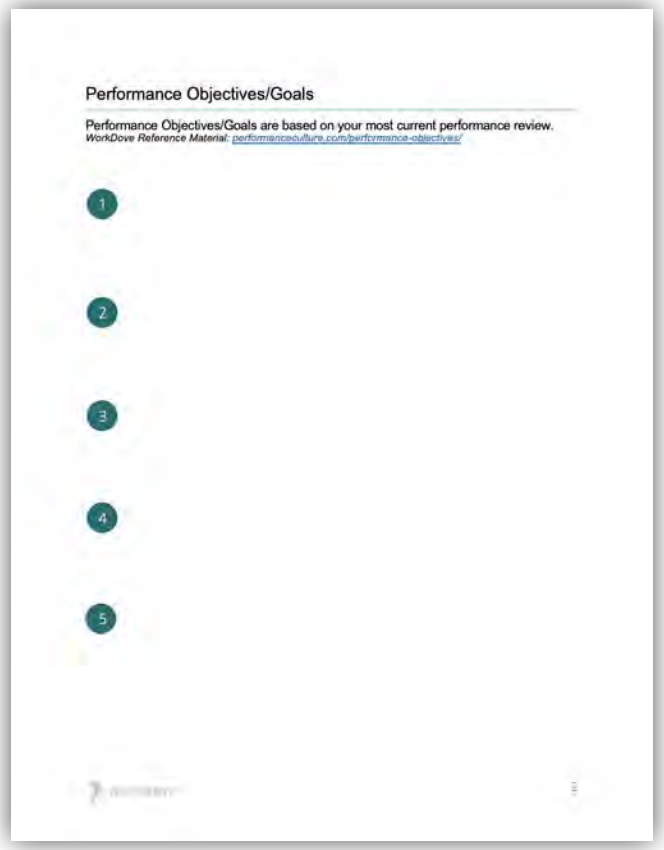


Check-in Template

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/

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-behaviors/

1
2
3
4
5

Email hello@performanceculture.com for your free Check-In Template

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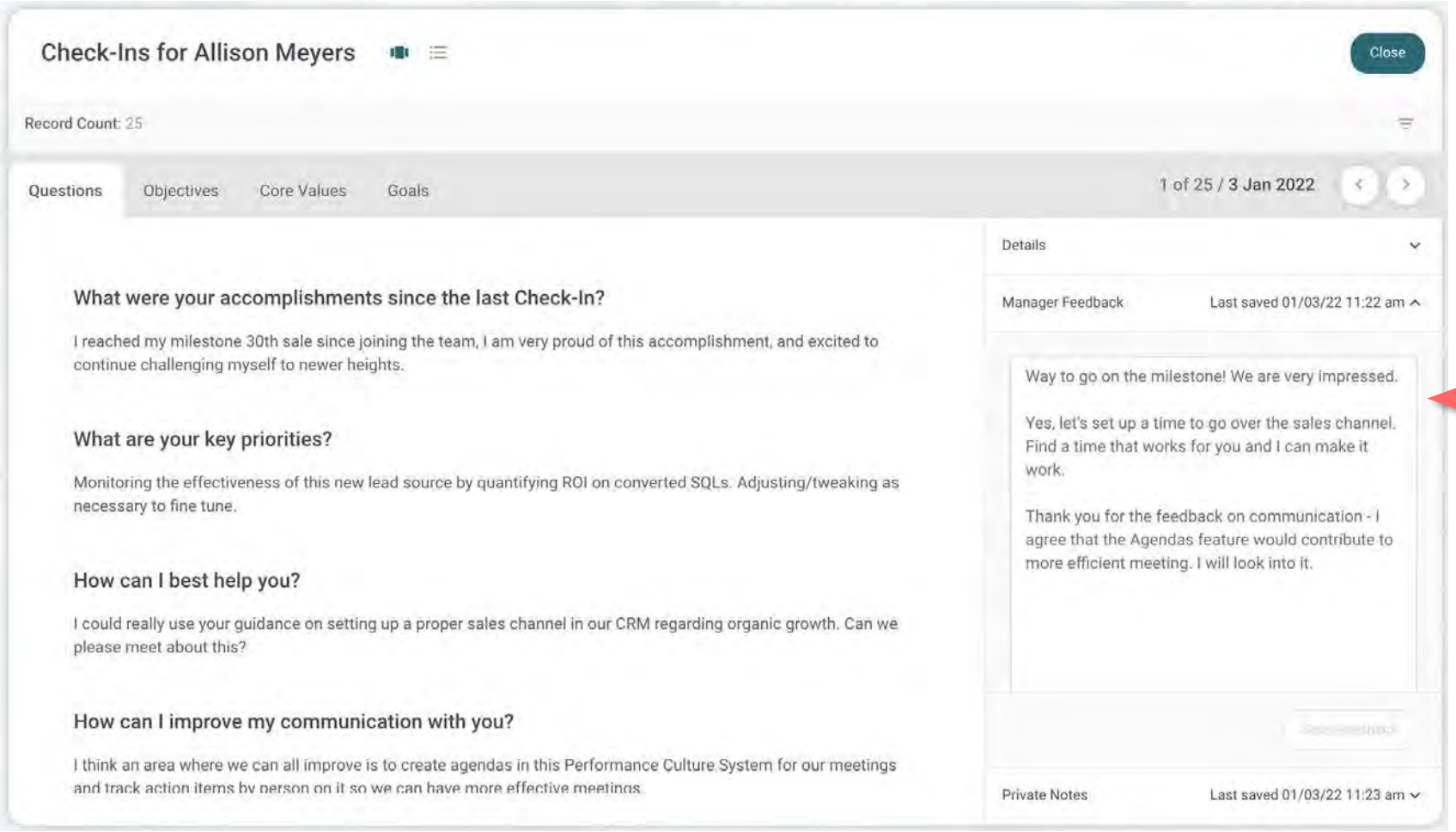
Ease of WorkDove Check-Ins

Viewing a Check-In



An area for manager feedback

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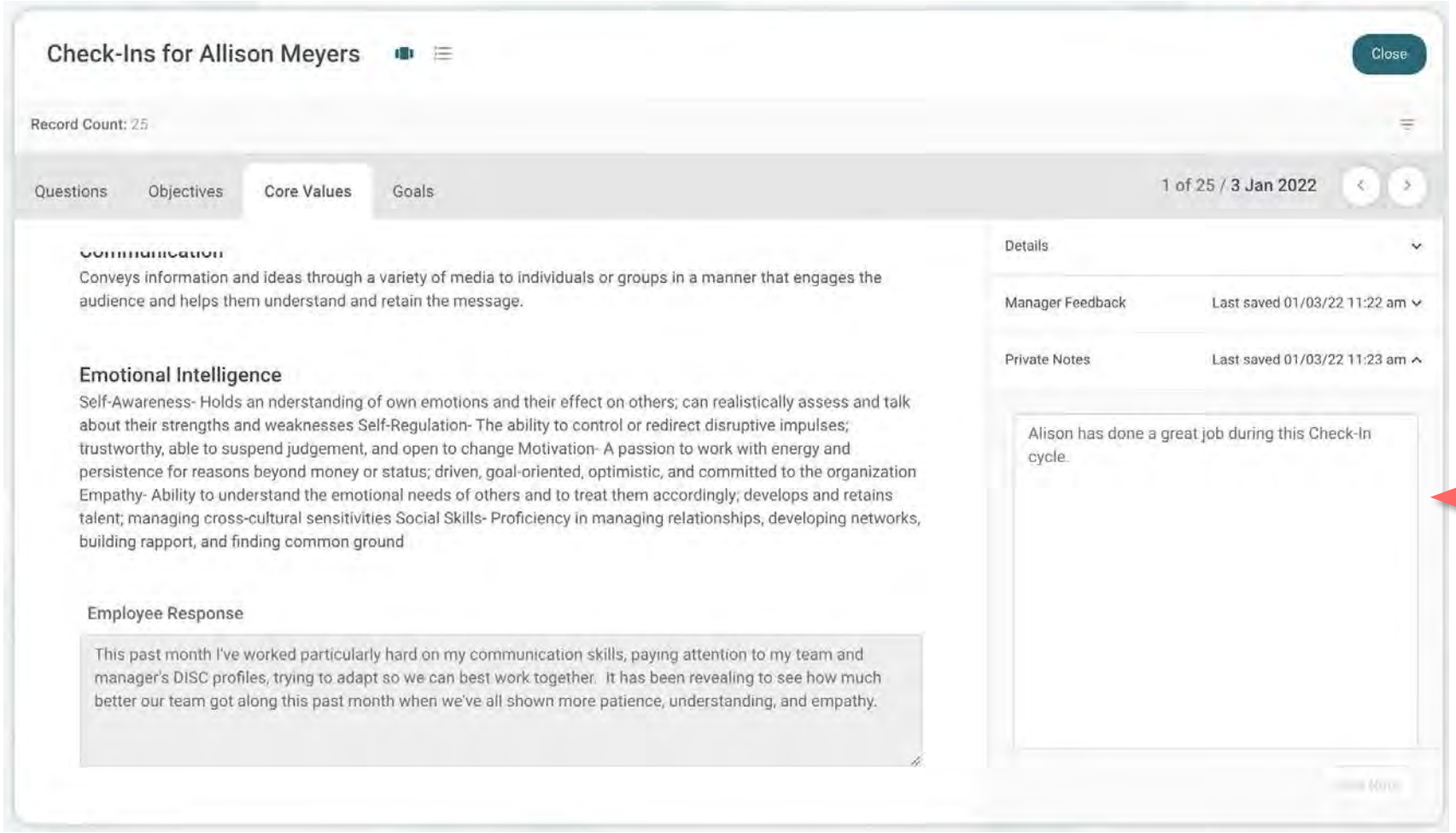
Ease of WorkDove Check-Ins

Viewing a Check-In



An area for private notes

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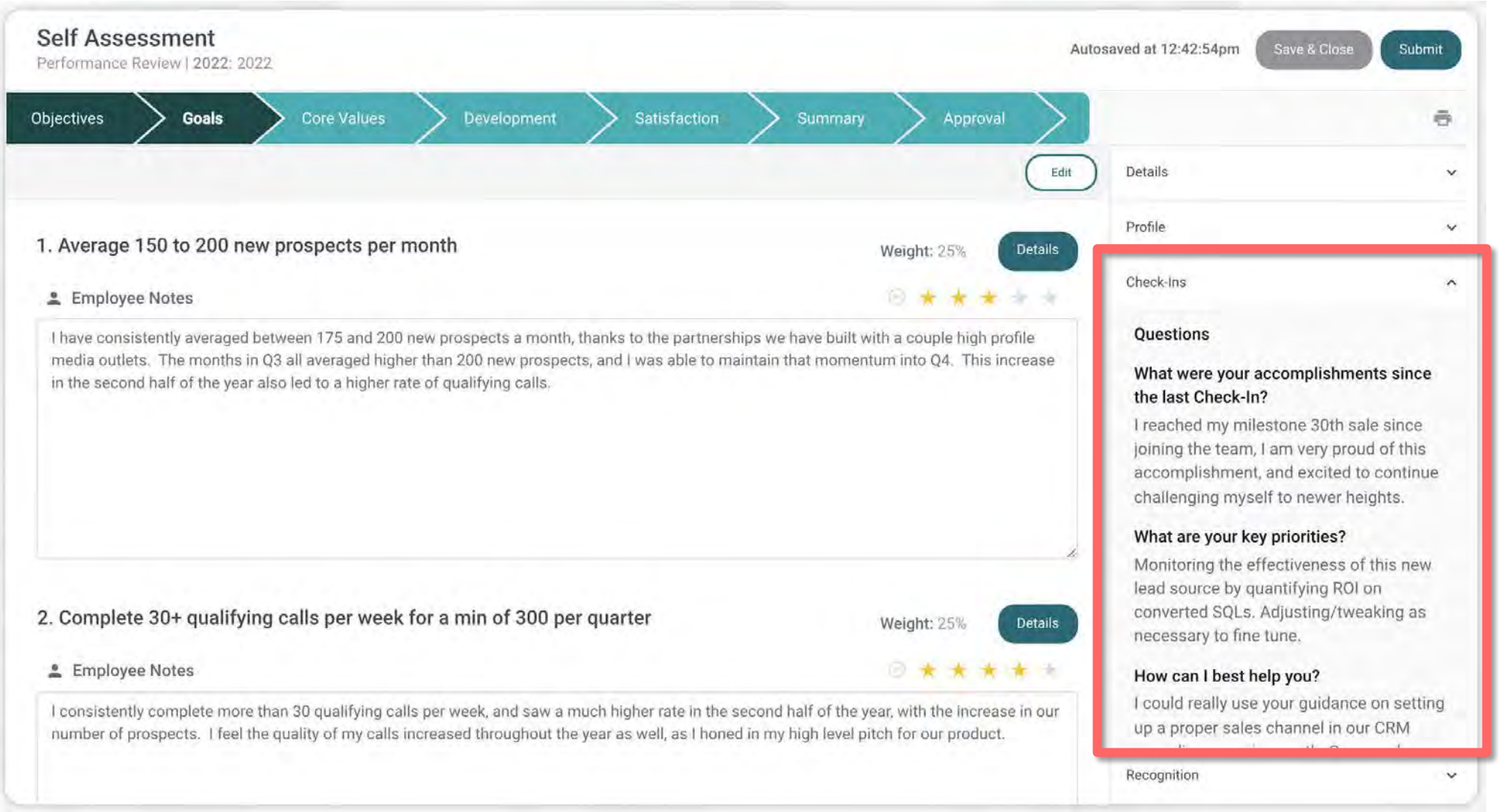
How Check-Ins Tie Into Performance Reviews



Integrated Check-Ins for ease of recall

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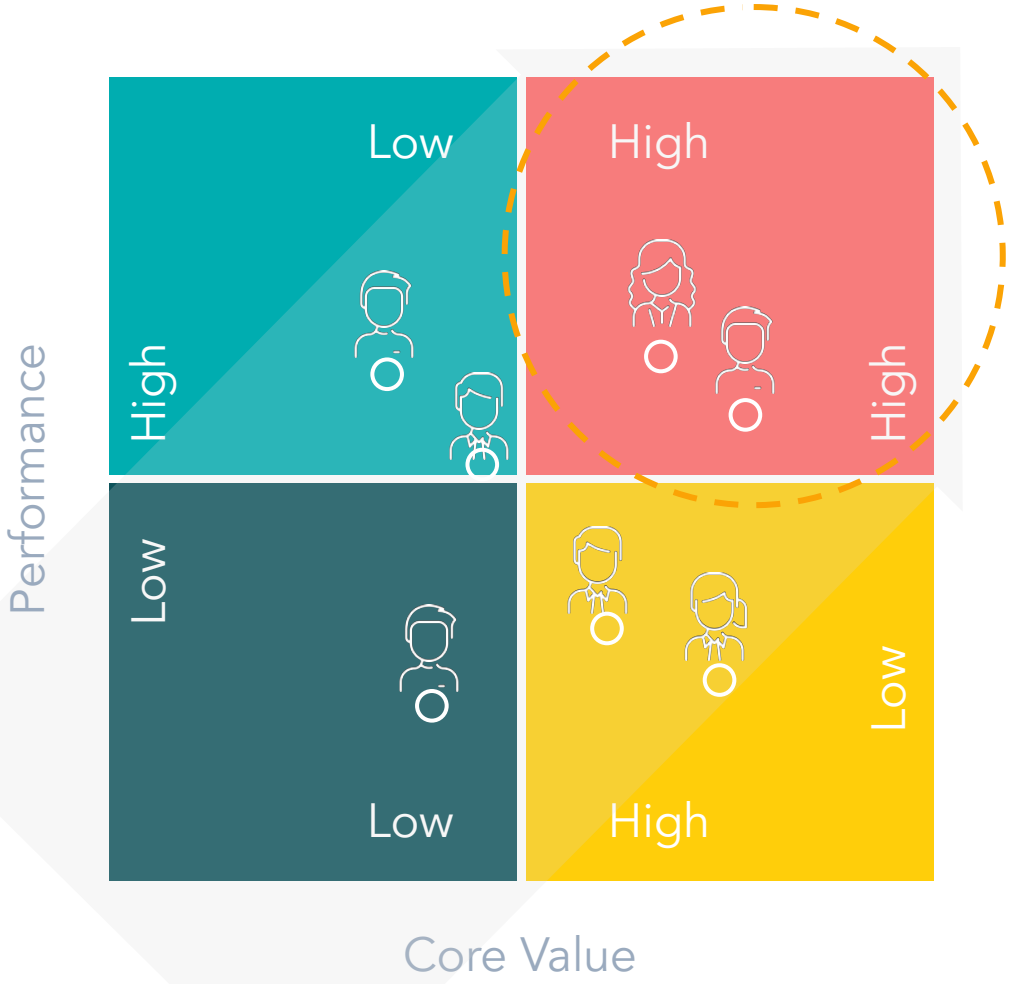
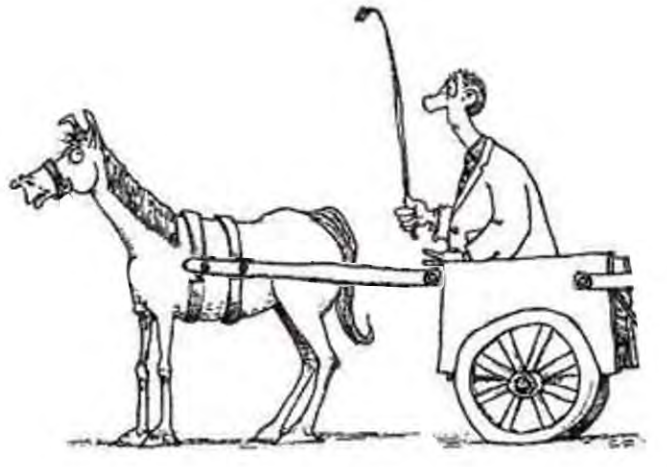
How Check-Ins Tie Into Performance Reviews

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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Email hello@performanceculture.com for your FREE 9-Box & PVM template!

View our previous webinar on Data-Driven Decisions: https://performanceculture.com/data-driven-decisions/

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Thank You!

To learn more and request a deeper dive, email us at Sales@PerformanceCulture.com