

QUARTERLY CHECK-IN GUIDE FOR LEADERS

Discuss Progress

Provide Helpful Feedback

- Recognize success
- Provide specific feedback regarding observed performance
- Acknowledge strengths/talents/abilities

Which Sounds Like

Let's talk about your progress this quarter.

- ▶ Here are some examples of areas in which you are doing well...
- ▶ Some accomplishments you've achieved this quarter are...
- ▶ You contribute to the success of our team by...

Ask Some Guiding Questions

What motivates you in your current role?

In what areas did you meet your professional goals?

What accomplishment are you most proud of this quarter?

Indicate Areas to Develop

Provide Helpful Feedback

- Identify areas of performance to improve
- Clarify areas of performance to elevate
- Provide specific behavioral examples and a plan of action (if appropriate)

Which Sounds Like

- ▶ Here are some areas of good performance that can be elevated...
- ▶ The skills and/or talents you need to use more effectively are...
- ▶ Areas that need improvement are...

Ask Some Guiding Questions

What part of your job is the most challenging? Why?

In what areas did you not meet the level of performance you would have liked to achieve?

Where do you think you could improve?

Identify Goals/Growth Opportunities

Provide Helpful Feedback

- Identify targeted areas for further development
- Set goals that are measurable and achievable
- Focus on specific actions to reach goals

Which Sounds Like

- ▶ Here are the goals identified for you to work on in the next quarter...
- ▶ I would like you to focus on gaining additional knowledge and/or experience in _____ (area/competency) ...
- ▶ This quarter I will provide _____ (support/resources) to help you achieve your goals...

Ask Some Guiding Questions

What skills are you looking to develop?

What professional growth opportunities interest you?

What are two to three things I could do to help you meet your goals?