

Engaging in Productive 1:1 Check-In Meetings

Planning, Executing and Monitoring Effective 1:1 Support

<u>Q12 Items Impacted</u>	<u>Leadership Behaviors Utilized</u>
<p>Q1 - Do you know what is expected of you at work?</p> <p>Q2 - Do you have the materials and equipment to do your work?</p> <p>Q3 - At work, do you have the opportunity to do what you do best every day?</p> <p>Q4 - In the last seven days, have you received recognition or praise for doing good work?</p> <p>Q5 - Does your supervisor or someone at work seem to care about you?</p> <p>Q6 - Is there someone at work who encourages your development?</p> <p>Q11 -Someone at work has talked to me about my progress.</p> <p>Q12 - In the last year have you had opportunities to learn and grow/</p>	<p>FL:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Select Leaders and Build the Function <input type="checkbox"/> Coach and Hold Direct Reports Accountable <input type="checkbox"/> Drive Functional Excellence <input type="checkbox"/> Take Ownership of Developing Leadership Talent <p>LL:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Develop and Execute Operational Plans <input type="checkbox"/> Coach and Develop Leaders <input type="checkbox"/> Assess and Improve the Performance of Leaders <input type="checkbox"/> Manage Boundaries and Allocate Resources <p>LO:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Set Objectives and Prioritize Tasks <input type="checkbox"/> Delegate and Follow Up <input type="checkbox"/> Coach and Develop Direct Reports <input type="checkbox"/> Assess and Improve Performance <p>IC:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Deliver Results <input type="checkbox"/> Functional Expertise <input type="checkbox"/> Strive to Improve <input type="checkbox"/> Take Responsibility for Your Own Development

Setting Up A 1:1 Check-In System

<u>Direct Report:</u>	<u>Supervisor:</u>
<ul style="list-style-type: none"><li data-bbox="103 233 743 300">❑ Create a “Check-In” google folder. Share that folder with your supervisor.<li data-bbox="103 310 721 378">❑ Go to 1:1 Template, go to File, Go to Make a Copy and move to your 1:1 folder.<li data-bbox="103 388 760 455">❑ Rename the document with the date of your 1:1 check-in meeting.	<ul style="list-style-type: none"><li data-bbox="880 233 1539 300">❑ Add the shared “Check-In” google folder to your drive.<li data-bbox="880 310 1516 378">❑ Schedule consistent check-in meetings ideally weekly<li data-bbox="880 388 1484 455">❑ Ensure that you do not schedule over those scheduled meetings.

Preparation for a Check-In Meeting:

<u>Section</u>	<u>Direct Report</u>	<u>Supervisor</u>
Part I: Goal Progress Monitoring	<ul style="list-style-type: none"> <input type="checkbox"/> Note evaluation goals. <input type="checkbox"/> Note Y or N for being on track for progress or not. <input type="checkbox"/> Make note of work completed and results of work since last check-in. <input type="checkbox"/> Make note of anticipated key activities before the next check-in. 	<ul style="list-style-type: none"> <input type="checkbox"/> Review DR's evaluation goals and prepare any questions, needs, or concerns in regards to the work associated with each goal
Part II: Follow Up	<ul style="list-style-type: none"> <input type="checkbox"/> Reference the previous check-in form, note updates from last week's priorities and any other updates needed to share. 	<ul style="list-style-type: none"> <input type="checkbox"/> Skim the previous 1:1 form to be prepared to ask questions about any items not addressed by DR.
Part III: Weekly Priorities	<ul style="list-style-type: none"> <input type="checkbox"/> Note what work will be completed this week 	
Part IV: Supervisor Support	<ul style="list-style-type: none"> <input type="checkbox"/> Items for Input - Note any questions or needs, along with any decisions that are needed from the supervisor. Also, note areas that you would like additional support or training. <input type="checkbox"/> Learning/Coaching - Note one success and one area for improvement. <input type="checkbox"/> Optional Better Support - If there is something that has been an obstacle (i.e. miscommunication) make note of the concern to be addressed in more detail during the 1:1 	<ul style="list-style-type: none"> <input type="checkbox"/> Learning/Coaching - Note one success and one area that you would like to see growth or improvement; determine if that conversation will need to be delivered as feedback or coaching using the SkillWill matrix and GROW. <input type="checkbox"/> Supervisor's List - Make note of items to discuss and needed actions not addressed in the rest of the check-in
Part V: Future Planning	<ul style="list-style-type: none"> <input type="checkbox"/> On back burner - Note 	<ul style="list-style-type: none"> <input type="checkbox"/> Be prepared to have the DR

	projects/tasks that need to be completed in the next month but you haven't gotten to yet.	add any "back burner items" that were not on the list.
Part VI: Repeat Back	n/a/	n/a

During Check-In Meeting:

<u>Direct Report:</u>	<u>Supervisor:</u>
<ul style="list-style-type: none"> <input type="checkbox"/> Proactively engage in conversation with detailed information, asking clarifying questions utilizing proactive tone - you drive this meeting! 	<ul style="list-style-type: none"> <input type="checkbox"/> At the start of each meeting positively greet your direct report (DR) and ask how they are doing, in general. <input type="checkbox"/> Ask clarifying and probing questions throughout the check-in meeting. <input type="checkbox"/> Provide succinct and clear feedback and directions when needed. <input type="checkbox"/> Close by thanking your direct report for their work and time.

<u>Section</u>	<u>Direct Report</u>	<u>Supervisor</u>
Part I: Goal Progress Monitoring	<ul style="list-style-type: none"> <input type="checkbox"/> Explain the notes in this section and be prepared to provide evidence and/or answer questions. 	<ul style="list-style-type: none"> <input type="checkbox"/> Ask questions/coach to ensure that progress is being made towards each of the goals or that improvement plans are put in place to support the progress to goal work.
Part II: Follow Up	<ul style="list-style-type: none"> <input type="checkbox"/> Share updates from prior check-in meeting. 	<ul style="list-style-type: none"> <input type="checkbox"/> Ask questions as needed. <input type="checkbox"/> Ensure that items from prior check-in are accounted for in the follow-up; if not, ask about those items.
Part III: Weekly Priorities	<ul style="list-style-type: none"> <input type="checkbox"/> Review and explain weekly priorities. 	<ul style="list-style-type: none"> <input type="checkbox"/> Ask questions as needed. <input type="checkbox"/> Identify any missing priorities that should be addressed.
Part IV: Supervisor Support	<ul style="list-style-type: none"> <input type="checkbox"/> Ask questions and share any needs noted under items for input and ask follow-up questions to ensure clarity. <input type="checkbox"/> Explain one success and area for improvement. Be open to feedback provided by your supervisor and ask questions about the feedback provided to ensure clarity. 	<ul style="list-style-type: none"> <input type="checkbox"/> Be prepared to answer questions and make note of any of your own "to do's" to ensure that the DR has the information/resources needed to do the work. <input type="checkbox"/> Provide feedback and coaching on the success and area for improvement. <input type="checkbox"/> If optional better support is suggested, ask clarifying

	<ul style="list-style-type: none"> <input type="checkbox"/> Optional Better Support - if there is something that has been an obstacle (i.e. miscommunication) make note of concern to be addressed 	<p>questions and be careful not to be defensive but open to that feedback</p> <ul style="list-style-type: none"> <input type="checkbox"/> On My List - Explain tasks and items from your list and answer any clarifying questions needed.
Part V: Future Planning	<ul style="list-style-type: none"> <input type="checkbox"/> Identify back burner tasks. 	<ul style="list-style-type: none"> <input type="checkbox"/> Ask questions about timing and follow up for the back burner items to encourage they are not forgotten. <input type="checkbox"/> Add any additional back burner items that need to be remembered.
Part VI: Repeat Back	<ul style="list-style-type: none"> <input type="checkbox"/> Type in the form and state your next steps and action items. <input type="checkbox"/> Transfer those action items and “due dates” to your own planner/calendar. 	<ul style="list-style-type: none"> <input type="checkbox"/> Type in the form and state your next steps and action items.

Post Check-In Meeting:

<u>Direct Report</u>	<u>Supervisor</u>
<ul style="list-style-type: none"><li data-bbox="99 233 789 300"><input type="checkbox"/> Transfer the Repeat Back/Next Steps to your own planner/calendar.<li data-bbox="99 338 756 405"><input type="checkbox"/> Make a copy of the 1:1 form, rename it with the next 1:1 meeting date.<li data-bbox="99 443 737 478"><input type="checkbox"/> Between check-in's, update the new 1:1 form.	<ul style="list-style-type: none"><li data-bbox="873 233 1563 300"><input type="checkbox"/> Transfer our own Repeat Back/Next Steps to your planner/calendar.