

MHR

# A Guide to Check-ins.

Advice and guidance for employees and managers on holding successful check-ins.



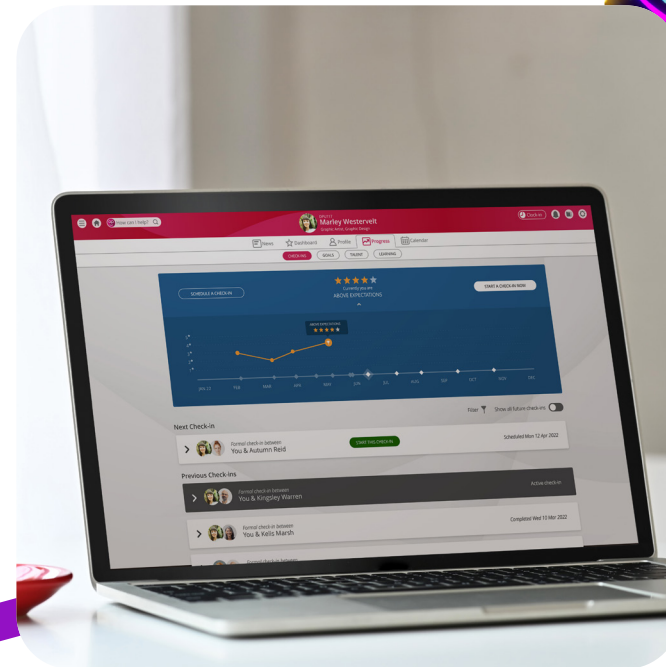
# Introduction

It's time to ditch the nerve-wracking annual appraisal and switch to a more agile and versatile check-in system.

When done right, check-ins have the potential to transform the performance management process, offering a huge boost to employee experience and engagement. That boost will pay off quickly. Organisations with high rates of employee engagement are 23% more profitable than those that aren't.

However, check-ins require a slightly different approach to appraisals. If you go in with the same attitude, they're simply not going to have the effects that you want.

**This guide is full of useful tips to help managers and employees get the most out of check-ins. It also has some key questions to ask during check-ins that will deliver the results you need, and some guidance on how People First can be used to take the whole process to new heights.**



# A bit of background...

Annual appraisals were first introduced in the middle of the twentieth century, and they were a great fit back then. Work was typically repetitive and predictable.

Most people performed the same task over and over. Regular feedback simply wasn't needed. Today, however, work is defined by constant change, varied jobs, and project work. To stay on track, employees need ongoing feedback, support, and guidance.

## So why have we kept annual appraisals?

They're a major source of stress for employees, more likely to demoralise than engage. With a lack of regular feedback, employees have no clue how well they're really doing, so they tend to imagine the worst. This can really harm the wellbeing and engagement at work, as they spend time thinking of ways to head off criticism. Meanwhile, managers have to take time out of their schedules to prep these meetings, distracting from other tasks.

**For the vast majority of organisations, you could say they are a complete waste of time, money, and resources.**

**It's time for a better way.**

# What are check-ins?

Check-ins are regular, informal meetings between employees and managers, where both parties discuss progress, goals, and personal development.

They'll also discuss any issues. Instead of happening on a set date, they take place when they are needed. This way, you can discuss and resolve issues as they arise, and continuously align work with personal and organisational goals.

**Here are just some of the benefits that check-ins bring for employees, managers, and organisations:**



Provide feedback and support in real-time

Address issues as they arise

Constantly realign work with goals

Build better, more human relationships between employees and managers

Improve communication, transparency, and information flow

Empower employees to drive their personal and professional development

Build a culture of trust, honesty, and openness

Make work more engaging, productive, and enjoyable





# Tips for managers.

As a people manager, you have a huge effect on your employee's experience of work. People leave bad managers, not bad jobs. If you're struggling with high employee turnover and low engagement in your team, check-ins could be the solution.

Pivoting to check-ins isn't easy. Annual appraisals are more of a numbers game, but a check-in is a chance to cultivate a human relationship with your employees. This requires a distinct set of soft skills that may have been neglected in your team.

These include the ability to listen, to empathise, and to understand the myriad different opinions, problems, and personality types that make up the average team.

While the transition from annual appraisals to check-ins will require time, planning, and training, you can increase your chances of success by following these tips.



1.

## Build trust.

All successful relationships are built on trust, and none more so than in the workplace. Without trust, the check-in process would fail before it started. After all, what good is feedback and advice from someone you don't trust?

It is important that employees feel that you, as their manager, genuinely have their best interests at heart. It may take time to develop this level of trust, but the results are well worth it.

Crucially, this means exhibiting the characteristics you would like to see in the best employee: enthusiasm, an interest in others, and a willingness to help whenever called upon.

**Trust works both ways. This means letting go of the urge to micromanage and interfere and trusting your team to do their jobs well.**



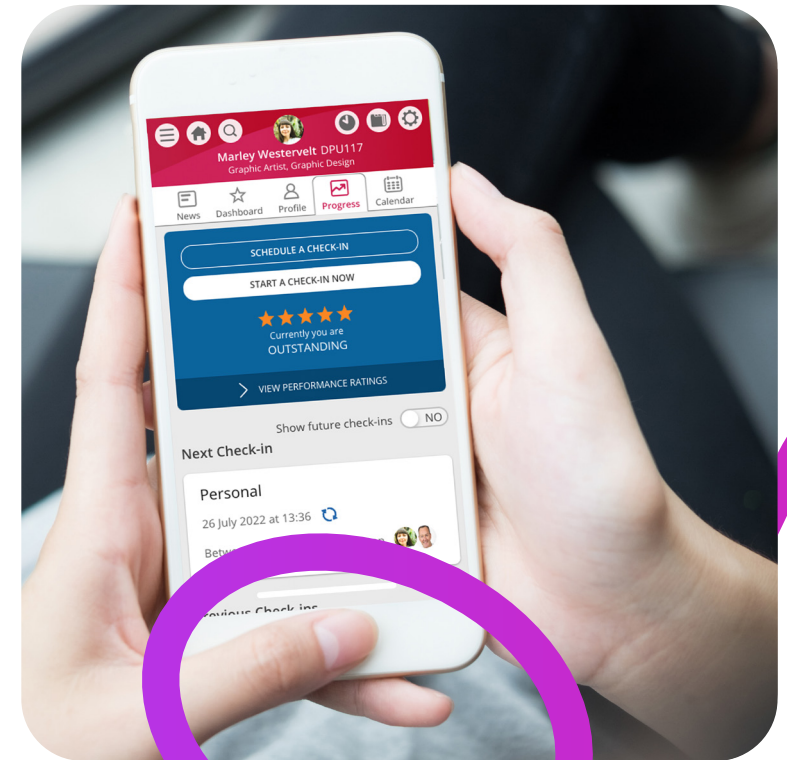
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## Go prepared.

A check-in shouldn't be seen in isolation, but rather as a continuation of previous conversations. It is important that you return to issues discussed in earlier check-ins, to ensure that problems have been resolved and progress is being made.

Most of us don't have flawless memories, so finding ways to keep track of your notes from check-in to check-in is key. This is where technology can be a massive help.

**People First** in particular has a range of features that make recording the outcomes of each check-in and keeping track of individual employee-specific data as simple as possible.



# 3.

## Learn to listen.

Managers are used to being assertive and taking the lead, but check-ins require a different approach. This is about the employee, and so their opinions, thoughts, and concerns are of paramount importance.

Research by The Harvard Business Review has revealed that the more you listen to employees, the better they think you are at giving feedback, and so the more likely they are to trust what you say.

On top of this, listening to your team members reinforces the fact that check-ins are not an exercise in powerplay, but a chance for two adults to meet on equal terms.

**People First** makes it just as easy for an employee to schedule a check-in as a manager, if an employee feels they have a concern that needs addressing. This helps flatten any perceived hierarchy between the two parties and allows them to talk openly and without fear.





# 4.

## Have meaningful conversations.

Although check-ins are about the employee, it is your responsibility as a manager to ensure that the conversation stays on track. If an employee has little to say, or simply hasn't given enough thought to the issues they want to discuss, it is your job to guide the check-in in the right direction.

Having a list of key talking points can provide a check-in with a logical structure and flow. Adobe, for example, believes that successful check-ins centre around three elements: **expectations, feedback, and growth and development.**

The expectations element covers goal setting, tracking, and reviewing, and helps ensure that the employee's work is aligned with goals at all times. The feedback element involves discussing past performance and identifying areas in which they can improve. The growth and development element is a chance to outline the training and experience that the employee needs to progress.

All the above can be easily tracked on an individual employee basis on [People First](#). Employees can take charge of their development by setting goals for development and choose relevant training programs to help their progression.



# 5.

## Bridge the personal and professional.

When building authentic relationships with your employees, one of the biggest challenges you face as a manager is finding the right balance between the personal and the professional.

Check-ins require a more human approach than traditional performance management processes, but work is still a professional environment.

Some managers become too close to their team to gain their trust. But too much of this and the relationship can veer into unprofessional territory. On the other hand, maintaining a distant, formal, and purely professional approach could stifle the check-in process completely.

**People First** presents itself more like a social media platform than an employee management tool, with plenty of opportunities to make personal connections in a professional context. For example, users can create their own communities, about anything that interests them, helping build up your company culture and making these check-ins a lot more personable.





# Remember that everyone is different.

It goes without saying that no two people are the same, and this simple fact gives your job an extra level of complexity.

The key here is to know that everyone is different, and not to expect one approach to work with everyone. By genuinely listening to your employees' thoughts, ideas, and concerns, as well as observing the way they work and interact with others, you should get a fairly good idea of what makes them tick. It is also important to accept that a diverse workforce includes diverse characters and personalities.

**Some people are outgoing and talkative, while others are quiet and introverted. Some respond well to constructive criticism, while others need a softer touch.**



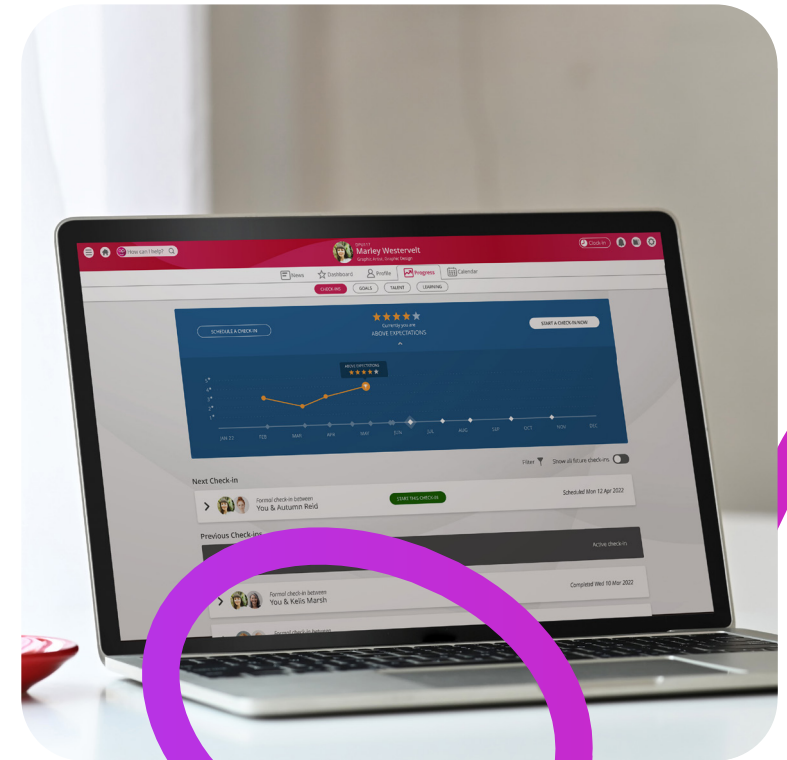
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## Ask for feedback yourself.

Check-ins are a great way to introduce real-time feedback, but this doesn't have to be a one-way process. After all, the whole point of feedback is to gain insights into performance, ultimately allowing you to improve at what you do.

As a manager, you might be doing too much of something, while neglecting something else. Unless someone tells you, you may never know. Plus, if your employees feel heard, and you make changes based on the feedback you get, this can really help them feel more engaged and more willing to give valuable feedback in future.

**People First** gives you the same process to request a check-in from your own managers, but you should take the opportunity to solicit feedback from your direct reports too. That'll give you a much better understanding of yourself and how you manage.





# 5 Great questions for managers to ask at a check-in.

1.

What's something you're proud of achieving this month?

Taking the time to recognise when an employee is doing well will ensure they feel appreciated. This helps them feel more engaged and will start the check-in off on a high note.

2.

What challenges do you think you've faced this month?

- a. What can we put in place to make sure that's not an issue again?
- b. Did you feel supported when you faced this issue?

This series of questions will ensure you can safely discuss any negative experiences without assigning blame. This can actually turn an unpleasant experience in the workplace into something positive, as your employee will feel heard. Make sure to action any feedback they give you though.

3.

Do you feel like you have enough time/resources to succeed in your role?

- a. Do you think you need any additional training or development opportunities?

Employees who aren't given the chance to develop professionally will start to look for greener pastures. Make sure you emphasise training opportunities you think they'll value.

4.

What can I as a manager do to support you? Is there anything I should start/stop/continue doing?

Soliciting feedback about yourself will ensure the conversation is more open and honest. This is also a great chance to fuel your own development as a manager.

5.

How are you feeling generally? Is everything going OK?

Check-ins are a great tool for touching base and making sure your employee feels safe and mentally healthy. If you know your employee is going through a challenging time in the personal life, make sure to reassure them and offer tools to support them at work.

# Tips for employees.

Let's be honest, traditional performance management practices did little to involve or engage you as an employee.

Check-ins offer a completely different approach. Rather than satisfying a bureaucratic need, this is a process designed for you, in which you play a central role. Instead of being a bystander in your own performance review, you are now an active participant.

While this means a greater say in your own progress and development, it also means greater responsibility. The success of check-ins largely depends on how you approach them. To ensure you hit the ground running, we've put together the following tips designed to help you make the most of the check-in process.



# Tips for employees. continued

1.

Forget old ideas about the employee-manager relationship

For many of us, work means a hierarchical organisation with a clear chain of command from top to bottom. In this type of structure, the employee-manager relationship is naturally unbalanced. When the two meet, it is the manager's job to talk, and the employee's job to listen.

With check-ins, there's no room for this old dynamic. Instead, you and your manager meet on the same terms, with the same goal in mind – to make your experience of work better.

So before you go into a check-in, forget any old ideas you have about the employee-manager dynamic. Remember that you are an equal party in this meeting and that your voice and opinions matter.

2.

Be honest

Along with trust, perhaps the two most important ingredients for a successful check-in are honesty and openness. This process isn't just about receiving feedback, but also getting to the bottom of any issues you may be experiencing at work. That means shining a light on all those aspects of work you find difficult, problematic, or downright frustrating.

Sounds simple enough, right? But in fact, it's probably the opposite of what most of us are used to doing at work. Like many employees, you may be more accustomed to putting on a brave face than discussing work-related problems – even if they are making you miserable, or stopping you from being at your productive best.

Check-ins demand a different approach, where both you and your manager discuss how work is really going, and then work together to make it more enjoyable and productive. For this to work, you have to be honest and upfront from the start.

# Tips for employees. continued

3.

Take ownership  
of your  
development

You may also be used to taking a passive role in your own professional development, where training is thrust upon you, and other people tell you what your strengths and weaknesses are without asking for your input.

Unsurprisingly, many employees feel like there is very little interest in their professional development – like the only way to move forward in their careers is to move on.

Check-ins are different. Rather than being a mere recipient of advice and feedback, you get to play a lead role in your own development. This means not only discussing how work is going but also the direction you want to be heading – and the skills you need to get there.

4.

See problems  
as potential  
solutions

There's a temptation to panic when we see a problem on the horizon at work. But it's much more emotionally and professionally healthy to see problems as opportunities.

Every time we have a problem, there is a chance to fix it – to make work better. Every time we fall short, we can take stock, reflect, and see what we could do better next time.

These moments contain the seed of positive change and true growth. A problem ignored or brushed aside will grow to become an actual issue. So rather than skirting around problems, discuss them during your check-ins. This is the only way things will improve.



# Tips for employees. continued

5.

Be willing  
to take  
constructive  
criticism

Remember that honesty runs both ways; not only should you feel able to speak your mind in a check-in, so should your manager. Of course, criticism should always be given in a constructive and supportive manner, as a way of improving your performance and experience of work.

Sometimes even the most constructive criticism can feel like a personal attack. But this is just an error of perception. If your manager only ever told you how great you are, you'd never learn anything new.

The truth is that other people's opinions are important. They allow us to see things from a totally different angle. Ultimately, these different viewpoints help us to better understand our work, and the action we need to take to move forward and to grow professionally.

6.

Take  
responsibility  
for the proces

The beauty of check-ins is that instead of happening on a set date, they happen as and when they are needed. For this reason, both you and your manager should be able to schedule a check-in at any time.

Not only are you jointly responsible for ensuring that check-ins take place, but also that talking points are followed up in future check-ins, and that you are satisfied with the outcomes of these conversations. If you aren't satisfied, bring it up with your manager.

After all, check-ins aren't just another administrative box-ticking exercise for you to sit through, but a dynamic process designed for you.

The MHR logo consists of a red square with the letters "MHR" in white, bold, sans-serif font.

## About MHR.

MHR supports businesses and organisations shaping their futures through these challenging times – increasing workforce adaptability through delivering integrated people management and learning solutions. We help reduce complexity and build business resilience – key to survival and growth. Find out how we can help you position your organisation for the road ahead.

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