

Facilitating a Successful Performance Check-In

Here are a few things to keep in mind when conducting a Performance Check-In:

✓ Have a Plan

- Set objectives for the meeting.
- Outline the flow of your meeting.
- Schedule the meeting.
- Allow enough time on your schedule for meaningful conversation.
- Choose a location free from distractions.

✓ Set the Tone

- Welcome the employee.
- Provide an overview of the meeting.
- Describe how you would like the employee to participate.

✓ Create Dialogue

- Encourage the employee to talk.
- Listen, don't interrupt.
- Remain objective.

✓ Collaborate

- Work together to determine demonstrated strengths and opportunities for improvement related to the behaviors associated with Our Values.
- Discuss team member development.
- Collaborate to finalize OKRs for the next year.

✓ Review Performance Based on Job Responsibilities

- Be direct and specific.
- Focus on performance and behavior.
- Don't get personal.
- Provide supporting observations or facts.
- Don't tiptoe around an issue.
- Discuss accomplishments.
- Talk about areas of growth and development.
- Ask for the employee's input.
- Don't forget to provide encouragement and motivation.

✓ Wrap Up the Meeting

- Discuss future performance expectations.
- Summarize the key points of the meeting.
- Agree on a follow-up plan for action items.
- Keep it positive and motivational.