

## TOTARA PERFORM:

# CONDUCTING A CHECK-IN

*Download and keep this PDF to help you plan, prepare and run your check-ins*

### PRE-MEETING CHECKLIST

Agree a date and time with your team member

Book a quiet, private meeting space

Review your notes from your last check-in with the team member

Prepare positive feedback to share

Identify improvement opportunities and think about how you will present them

Write down any organisational issues and news you want to share



### DURING THE MEETING

Consider asking these types of questions to guide an open, focused and productive meeting.

- *How has your week/month been?*
- *Can you update me on [project/task]?*
- *Do you have any questions about [project/task/news/issue]?*
- *What work is ahead/behind schedule?*
- *What areas of your work are you more/less confident about?*
- *Do you have any suggestions/improvements on...?*
- *What is getting in your way?*
- *How can I be more helpful?*
- *How will you approach this [issue/goal]?*
- *What can you/we do differently?*
- *What have you learned from [experience]?*
- *Who could help you achieve this [goal]?*

### POST-MEETING CHECKLIST

Write up your notes from the meeting

Share your notes (if appropriate) with your team member

Complete any actions you took from the meeting

Schedule the next check-in

