

Check In Meeting

This agenda is a template designed to provide structure for a Check-In conversation. The goal is to create a consistent and forward-looking discussion that helps team members feel supported, engaged, and focused on their most important work. Make sure you have a format where both people can add agenda items and that you can send after the meeting (I use OneNote).

1. Focus on the Past Week/Two Weeks (5 minutes)

- **What has gone well since we last spoke?**
 - *Prompt: Tell me about a win or a highlight you're proud of.*
- **What has been a challenge or a roadblock?**
 - *Prompt: Is there anything that's been slowing you down or causing frustration?*

2. Current Workload & Priorities (10 minutes)

- **Let's review your current priorities and expectations.**
 - *Prompt: Are there any shifts in our team's priorities that we need to discuss?*
- **What does your current workload look like?**
 - *Prompt: Are you feeling overwhelmed, or is there capacity for more?*
- **Where are you on key projects?**
 - *Prompt: What are the next steps on [Project A] and [Project B]? Are you on track to meet your deadlines?*

3. Goals & Development (5 minutes)

- **How does your current work connect to our overall team or company goals?**
 - *Prompt: Let's remind ourselves of the "why" behind the work.*
- **What progress have you made on your personal development goals?**
 - *Prompt: What's one thing you're learning or working on right now?*

4. Needs & Support (5 minutes)

- **What do you need from me right now to be successful?**
 - *Prompt: Is there a resource, a conversation, or a decision that I can help with?*
- **Is there anything else on your mind that you want to talk about?**
 - *Prompt: This is a safe space for us to discuss anything that's important to you.*

5. Closing & Next Steps (1-2 minutes)

- **Summarize key takeaways.**
 - *Example: "Okay, so I'll follow up on [X] and you'll get back to me on [Y]."*
- **Confirm the next Check-In.**
 - *Example: "Let's put our next meeting on the calendar for two weeks from now."*

Tip for Managers: Remember that this is a conversation, not a checklist. Use these questions to guide a genuine, two-way dialogue focused on building trust and providing support.