

EMPLOYEE NAME SAMPLE

These regular and respectful conversations are the core of the performance and development cycle.

The number of check-ins can be determined by the employee and supervisor and should be scheduled into both calendars for the duration of the development cycle. During these conversations the progress, action items, accomplishments, barriers and support needed related to the key goals and learning plan developed in **STEP 1** can be discussed.

Tool kit for supervisors and employees:

- [Effective Feedback](#)
- [Difficult and Productive conversations](#)
- [Coaching Questions](#)
- [8 Pitfalls to Avoid for Supervisors](#)

REGULAR CHECK-INS

Use these comment sections to summarize your conversations. You may copy and paste additional sections below as many times as you need to capture your regular meetings.

1. **CHECK IN DATE:** sample check-in #1

EMPLOYEE NOTES

What's working well: I enjoyed the courses I attended on meeting management and customer service and found the resources useful. I'm trying to apply some of the new tools in meetings, feels awkward and it's too early to tell how effective the changes will be – hoping it will lead to more engagement in our team meetings.

What's been challenging: I'm having a harder time applying the customer service skills with difficult client interactions where they are angry or upset. I need more coaching on how to de-escalate a situation when a client is angry. Given the high number of calls we've had recently, I've not yet had a chance to start working on the user manual but plan to do that next month.

SUPERVISOR NOTES

Recent changes to policy have contributed to more difficult customer calls. This has been a challenging month and you have been handling clients well. I'm confident it will get easier as you apply new skills. I suggest we debrief one client interaction each time we have our check-in meetings to support your learning. Thank you for your efforts during a difficult time. As we discussed, I'd like you to share some of your key learnings from the meetings management course with the team and seek their support in applying your new skills.

2. CHECK IN DATE: Sample check-in #2**EMPLOYEE NOTES**

What's working well: Our debriefs have been helpful and I'm having more success dealing with difficult clients. I shared key learnings from meetings management course with the team and started sending out agendas in advance, with approximate time allocated per item. Received good feedback from the team on the more organized structure and our last meeting only ran 5 minutes over time.

What's been challenging: I still haven't had time to begin the user manual documentation process. Will need to adjust timelines for completion of that project.

We still have not identified a committee for me to join. I will keep looking for opportunities.

SUPERVISOR NOTES

Our conversation was a good reminder for me to help identify a committee or advisory group for you to join. I will send you some suggestions within the next 2 weeks. Great to hear you are succeeding in applying new skills to deal with difficult customer interactions and improved meeting structure is working well. Your confidence seems to be increasing in these areas. We will review customer service reports next month. I'm okay with deferring completion of the user manual project to next Spring.

3. CHECK IN DATE: Sample check-in #3**EMPLOYEE NOTES**

What's working well: Team meetings have been starting and ending on time. Customer satisfaction surveys showed an increase of 10% over the same time last year, I'm hopeful this will continue to increase over the next few months. I will be canvassing the team for their input on what we are doing better and what we could be doing differently.

My first committee meeting is next week - I have reviewed the terms of reference and the minutes for the past 4 meetings to prepare.

I would like to enroll in two courses towards my industry certification this month.

What's been challenging: Still no headway on user manual as I've been too busy.

SUPERVISOR NOTES

I'm glad to see the progress on your goals and I appreciated our conversation about how to move forward with the user manual project. We both acknowledged that this is an important project that cannot be accomplished off the side of your desk. We agreed that you will book Friday afternoons in your calendar every week for the next six weeks to get the manual started.

I approved one industry course and we will defer the second until the new year.

I look forward to learning how you find the committee work, the committee was pleased to have a volunteer from our area.

4. CHECK IN DATE: Sample check-in #4

EMPLOYEE NOTES

What's working well: The Friday afternoon blocks of time have helped me get the user manual project started. I have met with two members of the committee I sit on to learn more about their department and role and am learning a lot more about UVic.

I've continued to receive positive feedback from the team on how the team meetings are run. They appreciate the agenda's ahead of time, and having confidence the meeting will end on time. The best feedback I heard was the meetings feel more productive than before.

What's been challenging: Customer satisfaction scores have been fluctuating and are down slightly. Not sure what this is attributed to.

SUPERVISOR NOTES

I'm glad to see the user manual project is underway, well done! I've also heard good feedback from the team about the meetings being more productive, that's excellent! We will continue to monitor customer survey results.

5. CHECK IN DATE: Sample check-in #5

EMPLOYEE NOTES

What went well: I completed my first course towards my certification with a 92% score on the exam. I was quite proud of that!

What's been challenging: Customer satisfaction scores are increasing slightly but still below target, I'm not sure what else our team can do to increase these scores. I will add this to our team agenda for discussion and brainstorming.

SUPERVISOR NOTES

Congratulations on your exceptional scores for your course! Well done.

We will analyze customer service reports at our next senior leaders meeting to identify any trends.

I would like to review progress on the user manual project at our next meeting as it will become a high priority to complete given the 2 new staff joining the team in the coming months.

[Take me to STEP 3](#)