

Check-in Conversation Framework

This framework can be applied to any Check-in format or agenda, as it gives guidance on how to have the Check-in conversation. Following this framework will help create better and more meaningful conversations that will lead to stronger relationships and better results.

Conversation Framework



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Assess

- Start by Assessing the situation and the conversation. Think about why this conversation is taking place and what everyone involved hopes to achieve as a result.
- Here are a few questions to ask as you prepare for the conversation:
 - What is your mindset going into the conversation?
 - What do you hope to get out of the conversation?
 - How might things look different as a result of the conversation?
- Tips for Assessing:
 - avoid assumptions
 - put yourself in their shoes
 - ask what other person hopes to accomplish
 - remember why this conversation is important

Ask & Listen

- As the conversation progresses, it's important to ask thoughtful and open-ended questions and focus on actively listening to the answers.
- Open-ended questions might include:
 - Tell me more about...?
 - How do you feel when...?
 - What else...?
- Make connections to the information shared to keep the conversation alive.
- Active listening involves more than just hearing sound, it is a voluntary activity.
 - Try not to focus on forming your response in your head while the other person is talking.
 - Acknowledge that you are engaged.

Clarify

- Throughout the conversation, articulate the key points that you are making and confirm and connect the points that others are making.
- Repeat back any key points or takeaways to show that you're engaged in the conversation, and to seek clarity so that everyone is on the same page.
- Continue to acknowledge and test understanding with the other person throughout the conversation.

Understand

- Put yourself in the other person's position, and consider their emotions, situation, and experience to gain a better understanding.
- During and after the conversation, imagine yourself in their position.
 - Has anything said during the conversation changed your understanding of the other person?
 - Or yourself?
- Replay and repeat key messages after the conversation to continue to grow your perspective and viewpoints.

Follow-up

- Finally, discuss any next steps or action items resulting from your conversation.
- If this is a Check-in with your direct manager or employee, you can document the conversation and any follow-up items in myHR/myPerformance.
- Depending on the nature of the Check-in or conversation, you may want to schedule a follow-up meeting or send a follow-up email to summarize key points and takeaways to reinforce your understanding.