Prepare for a useful check-in.

Stay connected. Make work better. Follow through.

> **Is the work going well?**
>
> **Is the job working well for the person doing it?**

Prepare from your own perspective. Leave unknowns open. You can skip anything you would rather discuss live.

My perspective: □ Employee □ Manager

Role / date

Stay connected: how are things going?

Employee: How is your current work going? How is the job working for you?
Manager: Based on what you have seen, how is the work going? Where could your support be most useful?

What is working and worth keeping?

What work is worth recognizing, and what did it make possible? What makes this role worthwhile and should be preserved?

Make work better

What is worth discussing or preserving? Pick up to two, most important first.
Workload or priorities · Tools or information · Skills or practice · Communication or teamwork · Recognition · Growth · Schedule or working arrangements · Pay or benefits · Something else · Nothing specific today

For growth: What would worthwhile progress look like? Learning something new or continuing to do the current role well are both useful answers.

Follow through: what remains open?

If you have earlier notes, bring them. What happened with your commitments? Did the action help, and what still needs attention?

Nothing specific today is a complete answer. Recognize what is working without inventing a problem. Use page two for the conversation and any next steps.

Talk it through. Agree what comes next.

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People in this conversation

Role / conversation date

Hear the other perspective

What did the other person add? Record what each person says, what you agree on, and any differences or unknowns that remain.

Agree on what happens next

What can each person do? What help is needed? Record an action only when its owner accepts it. Give work to the person who can do it or provide the needed support.

No new action is needed when preserving what works is enough. Use another copy if more actions are needed.

Proposed action / result: _____

Accepting owner: _____ Due date: _____

Support or dependency: _____

Expected improvement: _____

Review date: _____

Proposed action / result: _____

Accepting owner: _____ Due date: _____

Support or dependency: _____

Expected improvement: _____

Review date: _____

At the review, look at a relevant work example and ask how the change affected each person's experience.

At the review: separate action from outcome

What was completed, partly done, blocked, or changed? What actually changed for the work and the person? Record both perspectives. What remains open, and when will you return to it?

An action can be complete while the concern remains. Keep differing accounts visible. Agree what to continue, change, or close after reviewing the effect.