The Ultimate Guide to Performance Check-Ins

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▶ Ultimate Guides by Reflektive

In our Ultimate Guide series, you'll learn how to navigate the changing world of performance management. These comprehensive guides cover topics vital to HR leaders and senior executives committed to innovation in today's workforce.
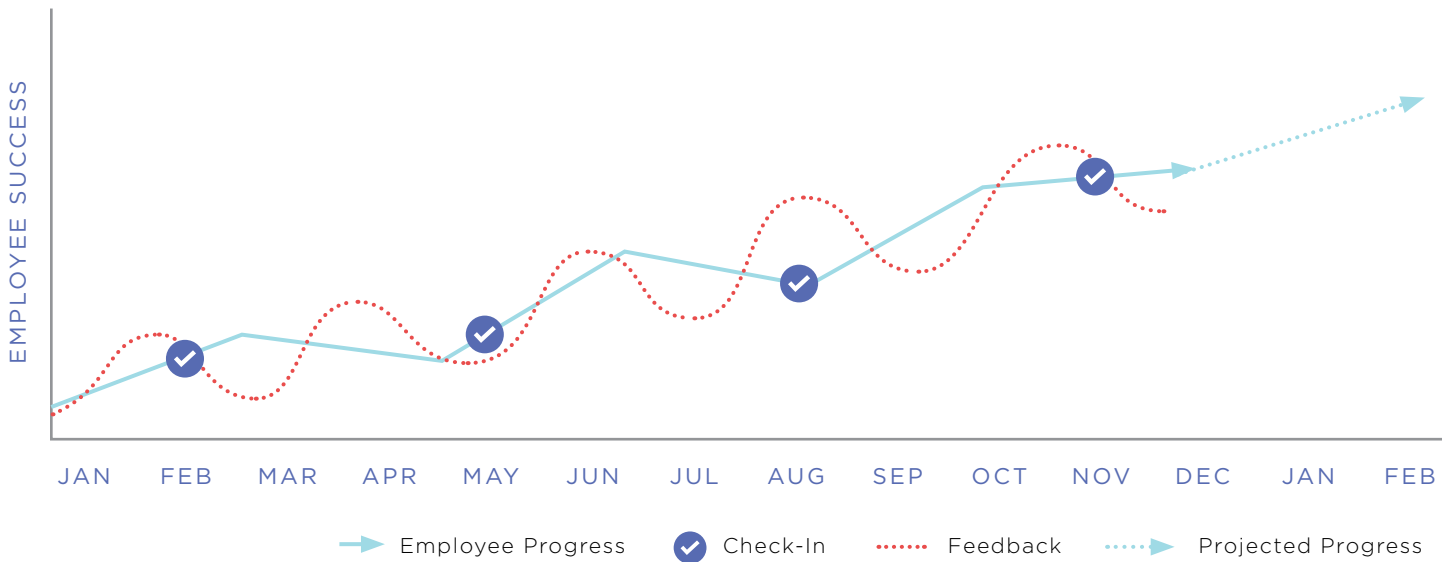
Introduction

The war for talent is real, with companies bidding regularly to get and keep the best talent. How can companies keep their employees motivated and growing? This is accomplished by shifting away from annual reviews to regular check-in conversations.

The way most companies give employees feedback right now is facilitating annual or bi-annual reviews. Performance reviews fall short of their objective: to help employees grow and improve performance. When they take place only once or twice each year, the focus is on past performance, and managers spend time justifying their reviews instead of talking to employees about growth. The performance check-in, bolstered by ongoing feedback and goal management, shifts conversations to look forward.

The biggest challenge with moving away from annual reviews is the significant change effort associated with it. This shift takes time, resources, and possibly budget, all of which are not plentiful. We're here to help you learn how to make the switch so you are relieved of the pressure of annual reviews, your managers are freed up to spend more quality time with employees, and employees are motivated and growing.

Definition of the Performance Check-In

A check-in is a 30-60 minute monthly or quarterly conversation with a manager and employee about progress over the review period, and objectives for the next review period. This approach enables a meeting focused on relevant and specific progress in career development and progress on objectives. The forward-facing focus makes the check-in a natural setting for creating goals that are aligned with company goals. Your company may already do regular one-on-ones — but that's not enough.

EMPLOYEE SUCCESS

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB

→ Employee Progress   ✓ Check-In   ····· Feedback   ·····→ Projected Progress

Where regular one-on-one meetings can be seen as gauging temperature, a check-in is a yardstick on planned progress, and is an opportunity to address any performance challenges an employee is having. Ideally, the check-in conversation does not require much planning if it's used in conjunction with an ongoing feedback tracking system.

Rise of Check-Ins

When countless Fortune 500 companies began implementing real-time feedback, they also began developing check-in programs. These early experiments demonstrated that dropping reviews was easier said than done — and choosing the right system and strategy was crucial to success.

The following organizations launched check-in programs to put managers and employees on a regular, more frequent schedule of setting expectations, giving feedback, and rewarding performance. It's important to note that managers will struggle to give good feedback if they do not first set expectations with their reports. We'll discuss best practices for check-ins in a later section.

MICROSOFT | 2013
Eliminated stack ranking and introduced monthly manager-employee meetings.

DELOITTE | 2015
Managers at consulting firm give feedback at the end of each project, or quarterly, for longer-term projects.

REFLEKTIVE | 2015
Reflektive launches beta of the Check-In.

2012   2013   2014   2015   2016

ADOBE | 2012
Software company created the Check-In based on employee feedback, with the goal of decoupling feedback from the salary review and making feedback more frequent and free-flowing.

GAP | 2014
Retailer launches monthly coaching sessions called Grow, Perform, Succeed.

IBM | 2016
Real-time feedback is given in a mobile app and feedback conversations happen quarterly at minimum.

Benefits of a Check-In

A check-in is designed to assist in driving meaningful and productive conversations around progress to an employee's goals or overall performance. Traditionally, annual performance reviews are focused on goals established at the beginning of the year, which have a tendency to become irrelevant by the time the manager has their review with their employee towards the end of the year.

FOR HR

- Less Policing: Putting power in the hands of managers means more focus on being a strategic partner to leaders, and developing employees
- Company Brand: Performance management and track record in building careers can be used as a competitive advantage when hiring
- Alignment: Employee goals and business goals are kept in check

FOR MANAGERS

- Alignment: Ensure employees are aligned with the manager's goals for each period, and where performance is lacking, both sides take part in creating a path for improvement
- Actionable: Instead of evaluating once per year and focusing on compensation updates, these discussions can be developmental and renew motivation
- Efficiency: Holding a check-in conversation is quicker than writing an essay, avoiding the nearly 210 hours per manager spent on administrative performance-related tasks

FOR EMPLOYEES

- Feedback: Enables managers and employees to have more frequent conversations about growth and progress so they know where they stand and how they can improve before compensation updates are made
- Psychological Safety: Makes bad news less traumatic because employees are given tools to fix performance and improve
- Time: Takes employees only five minutes to complete a self-assessment

Managing Change: The Transition From Reviews

Both IBM and Adobe surveyed their employees before launching a new performance management program — in both cases, seeing record-level engagement on their company discussion boards. Inviting employees to vent their frustrations with the existing process and propose ideas and solutions brings the whole company aboard before changes are implemented.

Once this feedback is collected, HR must ensure the resulting check-in program addresses needs specific to the company. Allowing departments to vary the frequency of check-ins based on needs or enabling managers to write their own check-in questions are some ways companies can make the check-in personalized and unique. Meanwhile, HR needs to ensure they are collecting useful data with some consistency across the organization.

Change management can fail for many reasons — but as long as you've picked the right software and developed the right program, the last step is to get people on board. Your check-in must be lightweight and easy to use, so training will focused on the new program, not the technology, as employees have little patience for non-intuitive tools.

To illustrate how your check-in program is designed for employee needs, include quotes from employees in launch materials. This is an important step that underlines the shift of the HR department from being compliance-driven to people-focused.

Training

To make this shift successfully, businesses need to offer training and have best practices on hand so managers feel empowered to give feedback.

Some examples of training materials include short videos, digital displays, bite-sized tips posted on calendars and feature stories about how individuals at the company are succeeding with feedback.

FOR MANAGERS

Important themes for training include connecting the employee's work and results to the big picture and being sure to balance talking with listening.

FOR EMPLOYEES

Training must include learnings on how to ask for feedback if they aren't getting what they need, and how to share their aspirations and development needs with their manager.

Every new feedback program must be launched with training sessions unique to the employee's role as an individual contributor or manager. A live video session can be held for all employees, with in-person sessions to train managers. Large companies may offer online classes on topics such as how to give raises, career coaching or how to have tough discussions. Companies of all sizes might offer live chat or a support center where employees can ask HR-related questions.

Lastly, it is important to train senior-level employees on both how to give and receive feedback. Creating a feedback culture requires participation on all levels. Employees will be most receptive to feedback when it is modeled by their superiors.

Measuring Results

When a check-in program is launched, expect employees to take some time to come on board. The first year must be built on proving the use case of check-ins as a performance management solution, and following years the process will become more refined.

In the short term, polls can help prove the feedback program is serving its purpose. To get the greatest participation, we recommend asking one question at a time.

For example, Adobe used these questions in employee surveys:
- "The feedback I receive is helpful to my performance"
- "My manager is open to receiving feedback from me"

Best Practices

Frequency

The frequency of reviews must fit business cycles. If business growth is evaluated on a quarterly basis, it makes sense to also evaluate performance on the same cycle. A robust HR department may be able to allow different business sectors to run their own review cycles. An engineering department might run a check-in every six weeks following a sprint, while a sales team can run quarterly check-ins.

Timeline (JAN–DEC) with Internal Check-Ins:
Team A, Team B, Team C, Team D
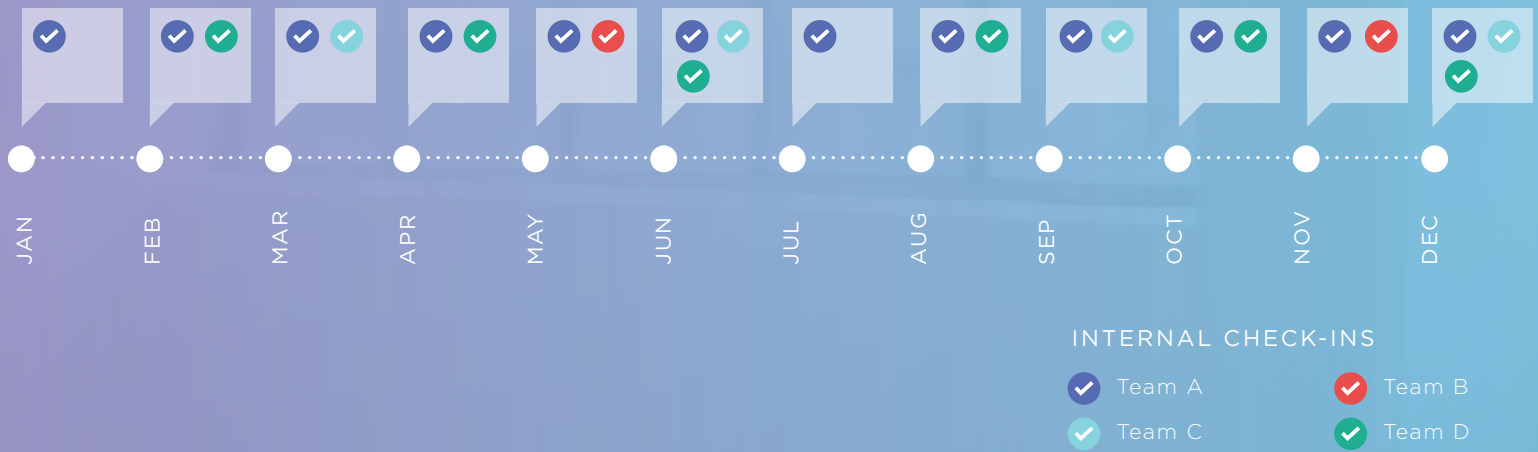
Writing Check-In Questions

The check-in form shouldn't take more than 15 minutes for the employee to fill out. Therefore, the questions must be lightweight and specifically geared towards understanding what is and what is not working for the employee.

The quality of check-in conversations depends on the questions you ask. Thinking about your questions from both the manager and employee perspectives will ensure the best questions. Check-in questions can be short answer or a rating. Consider the following factors when creating questions for your reviews:

- Make the question clear and concise so employees understand what they're being asked to answer.
- Always make sure the employee will learn what they did well and/or what they can improve on when they hear their manager's feedback on the questions.

GOALS

- ▶ What goals were completed?
- ▶ What goals are still in progress?
- ▶ What is getting in the way of achieving goals, if anything?
- ▶ How do goals need to be adjusted to align with changing priorities?
- ▶ What resources are needed to better reach goals?
- ▶ How do individual goals support department or company-wide goals?

PERFORMANCE

- ▶ What behaviors should the employee continue to demonstrate?
- ▶ What behaviors should the employee start doing to achieve results?
- ▶ What behaviors should the employee stop doing to achieve results?

DEVELOPMENT

- ▶ What are your career goals/aspirations?
- ▶ In what areas do you want to grow/develop in order to achieve your career goals?
- ▶ What experiences and opportunities can be provided to assist you in achieving your career goals?
- ▶ What can the company do to support your development?

Multiple Cycles

Depending on the complexity of your business, you may find different departments or regional offices need to run check-ins on their own unique timing. The end of the quarter for one group may fall right in the middle of a busy period for another. Being able to run concurrent check-in cycles in your company enables each group to get the highest level of participation from the program.

Check-In Models

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Adobe		✔		✔		✔		✔		✔		✔
IBM	✔			✔			✔			✔		
Deloitte			✔			✔			✔			✔
Pinterest	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Digital Ocean		✔			✔			✔			✔	
Protective Life	✔			✔			✔			✔		

✔ Adobe - 8 weeks - Custom

At the start of each fiscal year, employees and managers set specific goals. Then, at least every eight weeks but usually much more often, people "check in" with their bosses for a real-time discussion of how things are going. At an annual "rewards check-in," managers give out raises and bonuses according to how well each employee has met or exceeded his or her targets. "Managers are empowered to make those decisions," says Morris. "There is no 'matrix.' HR isn't involved."

IBM - Quarterly - Progress / Developmental

Managers assess 5 things - business results, impact on client success, innovation, personal responsibility to others, and skills. Managers will assess whether employees have exceeded or achieved expectations for their role in each of those five dimensions or if there's a need for improvement.

Deloitte - Quarterly - Evaluative

1. Given what I know of this person's performance, and if it were my money, I would award this person the highest possible compensation increase and bonus [measures overall performance and unique value to the organization on a five-point scale from "strongly agree" to "strongly disagree"].

2. Given what I know of this person's performance, I would always want him or her on my team [measures ability to work well with others on the same five-point scale].

3. This person is at risk for low performance [identifies problems that might harm the customer or the team on a yes-or-no basis].

4. This person is ready for promotion today [measures potential on a yes-or-no basis].

Pinterest - Monthly - Goal-Based

- Have goals changed since the last check-in?
- Are individual goals complete, on-track, ahead, or behind?
- What went well this month?
- What will help make better progress towards future goals?

DigitalOcean - Quarterly - Developmental

Learn more about DigitalOcean's approach.

Protective Life - Quarterly

Learn more about Protective Life's approach.

How Reflektive Can Help You Move from Annual Reviews to Check-Ins

The performance check-in model is new to most businesses. The examples modeled by early adopters can guide best practices.

At Reflektive, we help hundreds of industry leaders move from annual reviews to the Check-In process with Real-Time Feedback. Contact us to learn about how the Check-In integrates with Real-Time Feedback, Goal Management and more to help your business.

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■ Check-in
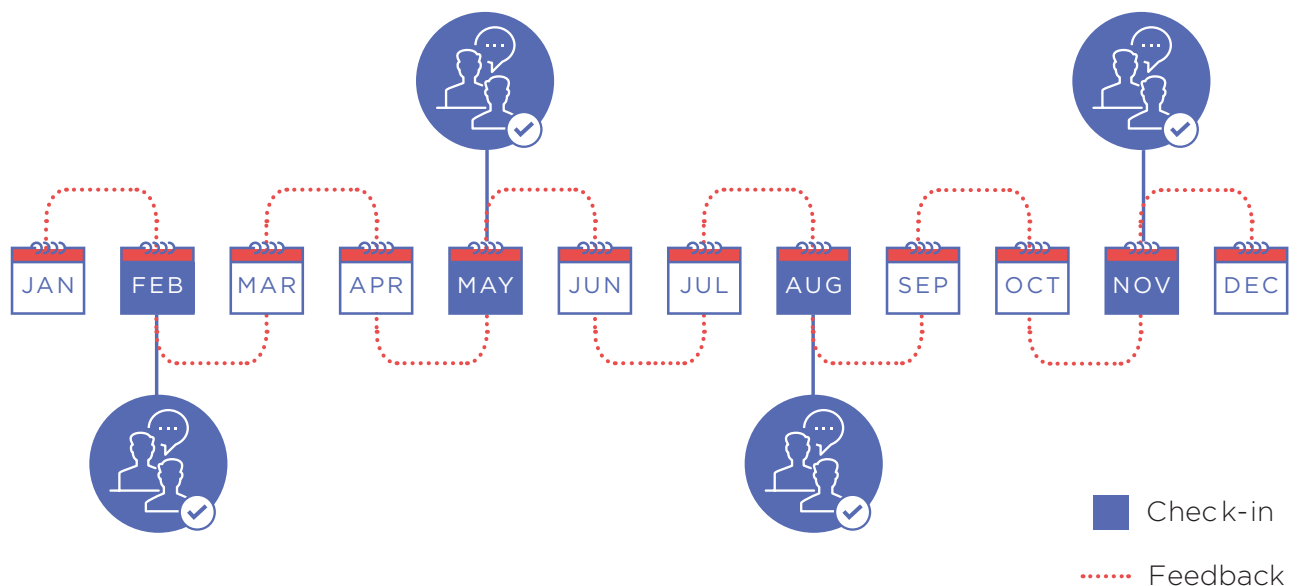
······ Feedback

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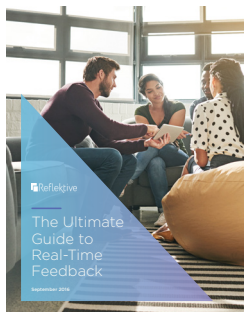
THE ULTIMATE GUIDE TO REAL-TIME FEEDBACK E-BOOK

THE ULTIMATE GUIDE TO PERFORMANCE RATINGS E-BOOK

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