

Check-in Conversations

A Manager's Guide

Regular Check-in Conversations are fundamental, fostering two-way discussions between managers and staff. These conversations help build a culture of achievement, shared learning, and engagement at UBC. Through successful Check-ins, managers can engage in inclusive, respectful, and tailored conversations with their staff, focusing on goals progress, projects, well-being, and career. By promoting collaboration and mutual understanding, these conversations provide timely alignment opportunities with organizational goals.

This guide is designed to provide practical prompts and examples that will support managers in preparing for, facilitating, and reflecting on what successful Check-in Conversations look like with their staff.

Follow the three principles of effective conversations:

Managers have a significant influence on how staff feel during Check-in Conversations. By genuinely caring and adhering to three core principles, managers foster authentic, two-way dialogue. These principles are essential for creating conditions that support generative, meaningful conversations and ensure the success of these interactions.

STRENGTHS-BASED

Recognizing and highlighting what is working well in others.

CREATIVE DISCOVERY

Unlocking potential through collaboration, care and curiosity.

MUTUAL LEARNING

Recognizing you both have something to share and learn.

Before Check-in Conversations, be sure to prepare:

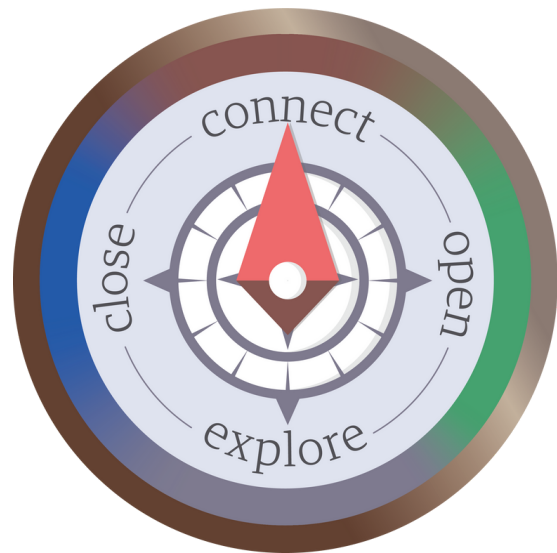
Preparation significantly enhances the quality of Check-in Conversations. Managers are encouraged to co-create agendas with their staff and bring previous meeting notes, specific feedback, and relevant supporting materials.

Consider the following questions:

- What topics and areas should I include in the agenda for our discussion?
- Which resources or previous discussions should I review to ensure a productive discussion?
- What specific aspects of my staff's well-being and workload should I focus on?
- How can I maintain and strengthen trust during our conversation?
- What tasks and actions do I need to follow up on today?
- How can I offer feedback and input to support ongoing learning and development?

During Check-in Conversations, consider the COEC Model:

To assist managers and staff in having more effective and co-created conversations, the GPS Program recommends using the Connect, Open, Explore, Close (COEC) Model. This communication model was developed in-house in partnership with Coaching Services, Central HR and Extended Learning. The COEC Model offers a structured framework for staff and managers to engage in more connected and effective conversations.



CONNECT: Cultivate trust and safety

Starting a conversation with meaningful, genuine connection is so important. It helps smooth transitions and demonstrates genuine care beyond the Check-in agenda. It also demonstrates a commitment to the other person’s well-being, especially in stressful situations. Connecting before diving into the agenda, sets the tone for collaboration and builds trust, which is crucial for fostering a safe and open conversation space. By encouraging honest, constructive dialogue through active listening, and mutual respect, managers can help ensure that staff perspectives, ideas and contributions are heard, seen and well-respected.

Connect by:	Tailor the examples to fit your context:
• Grounding the conversation in care, including the whole person, well-being, and interests. • Expressing appreciation for recent achievements, efforts, and teamwork. • Listening fully, paraphrasing, and demonstrating a participatory, non-directive approach. • Being mindful of your influence and treating others with positive regard and respect.	• <i>‘How are you doing and managing these days both at work and outside work?’</i> • <i>‘I want to acknowledge and appreciate your contributions to this project.’</i> • <i>‘It sounds like... I’m looking forward to this conversation and being your thought partner.’</i> • <i>‘What can I do to ensure you feel comfortable sharing openly with me today?’</i>

OPEN: Co-create purposeful dialogue

A good opening to a conversation establishes alignment on expectations, approaches, and desired outcomes. A purposeful agenda aligns goals, confirms work priorities, reviews progress, tackles challenges, and collaboratively devises solutions. This sets the stage for a creative, engaging, and productive Check-in Conversation.

Open by:	Tailor the examples to fit your context:
• Clarifying objectives and confirming expectations for your shared time. • Ensuring staff help co-create and confirm the desired outcomes. • Asking questions, inquiring and establishing shared understanding. • Anticipating and addressing challenges with curiosity.	• <i>‘What are you hoping to focus on and achieve today? Here are the points I’d like to include.’</i> • <i>‘I suggest we focus on the following – what would success look like related to this particular goal?’</i> • <i>‘Help me understand your thinking. Tell me more about the situation.’</i> • <i>‘What challenges have you encountered? How can I help?’</i>

EXPLORE: Collaborative in a creative and productive manner

Exploration is central to having successful Check-in Conversations. It is about listening, asking questions, inquiring, sharing perspectives, surfacing ideas, and challenging assumptions. In a genuine two-way conversation, exploration invites managers to engage as thought partners with staff, encouraging creative thinking. This approach helps find solutions, discuss successes and setbacks, generate new ideas, and explore opportunities to advance the work.

Explore by:	Tailor the examples to fit your context:
• Inquiring about what are the opportunities, challenges, and areas for growth.' • Listening attentively, being curious and asking questions that encourage dialogue. • Inviting different perspectives, ideas and solutions before giving advice or making assumptions. • Establishing alignment around goals, values and priorities. • Inviting opportunities to give and receive feedback that is descriptive, timely, objective and constructive.	• <i>'What are your strengths, and what skills can you build on? What support do you need to progress?'</i> • <i>'What is the ideal outcome? What could you do differently?'</i> • <i>'What have you tried? What are possible solutions? Have you left any ideas off the table?'</i> • <i>'How do you see your current goals aligning with our team's overall priorities?'</i> • <i>'I want to share an observation. I have been impressed with... and appreciate.... Let's discuss what went well and what could be improved.'</i>

CLOSE: Confirm insights, actions and commitments

Bring the Check-in Conversation to a close by reviewing the agenda and expectations and confirming agreed-upon takeaways and next steps. An effective close allows both manager and staff to contribute to the final summary of key points, actions and commitments. A strong close provides an opportunity to express appreciation while setting expectation for future Check-Ins Conversations.

Close by:	Tailor the examples to fit your context:
• Checking in on desired outcomes and ensuring mutual understanding about key takeaways, commitments and accountabilities. • Acknowledging and appreciating what you both learned from each other. • Demonstrating care and respect by asking about their engagement and wellbeing. • Planning the next steps, timelines and when you will connect again.	• <i>'What would be our next step moving forward? What insights have you gained so far? What actions do you intend to take, and when?'</i> • <i>'Here are the key points that stood out from our conversation.'</i> • <i>'How do you feel about your current workload? And how are you doing overall?'</i> • <i>'We've covered some important points during our time together. Let's confirm our commitments and when we will follow up next.'</i>

After Check-in Conversations, be sure to reflect:

To make your next Check-in Conversation even more effective, it's important to prepare, practice, and reflect.

Consider the following questions:

- What are the key points I need to remember or document for our next Check-in?
- What did I appreciate most about today's conversation?
- Which aspects of the conversation were particularly challenging?
- How can I take into consideration what was shared by staff in terms of approach, working style, and preferences to tailor future Check-ins?
- What insights did I gain about myself as a leader?