PLAYING IN THE SANDBOX

Inspiring Action in Today's Leaders

20-MINUTE WEEKLY CHECK-IN

Use this worksheet to outline your action plan and key elements for setting up and conducting weekly 20-minute check-in meetings with each of your team members. Fill in the required information and reflect on your approach to ensure effective communication and support.

NOTE: You have two agenda options to follow and tweak to fit your style.

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20-MINUTE WEEKLY CHECK-IN
MEETING ACTION PLAN AND OUTLINE

ATTENDEE _____

DATE _____

SECTION 1 | PREPARATION FOR CHECK-IN MEETINGS

1] What projects and tasks are your team members currently working on?
List the projects and tasks for each team member.

2] What are the main goals and targets for your team members?
Specify the individual goals and targets for each team member.

3] What skills or areas of development do your team members want to focus on?
Identify the skills or knowledge your team members wish to enhance.

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20-MINUTE WEEKLY CHECK-IN
MEETING ACTION PLAN AND OUTLINE

SECTION 2 | CHECK-IN MEETING QUESTIONS & AGENDA

1] Opening and Positive Tone
Welcome and express appreciation for your team member's contributions.

2] Individual Updates
Ask your team member to share updates on their projects and tasks.
Encourage them to highlight accomplishments, challenges, or roadblocks.

3] Goal Progress and Alignment
Discuss the progress made toward individual goals.
Evaluate the alignment of goals with team and organizational objectives.
Identify any adjustments or updates required.

4] Skill Development and Support
Inquire about specific skills or knowledge your team member wants to develop.
Discuss opportunities for growth, such as training programs or mentoring.

5] Feedback and Recognition
Offer constructive feedback on their performance.
Acknowledge their contributions and efforts.
Ask for their feedback on team dynamics, processes, or any concerns.

6] Celebration
Celebrate wins, milestones, or achievements.

7] Closing and Next Steps
Summarize key takeaways from the meeting.
Establish action steps and priorities for the upcoming week.
Reinforce availability for ongoing support and guidance.

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20-MINUTE WEEKLY CHECK-IN
MEETING ACTION PLAN AND OUTLINE

SECTION 3 | ASSIGNMENTS & NEXT STEPS

1] Assignments for NEXT MEETING (*to be completed by the attendee*)
Assign specific tasks or projects to discuss in the next meeting.
Identify any resources or support required.

2] Attendee's PREPARATION CHECKLIST:
Come prepared with updates on projects and tasks.
Reflect on progress toward goals and identify any challenges.
Consider opportunities for skill development.
Gather feedback or concerns to discuss.
Prepare any recognition or celebration moments.

Remember, the purpose of these check-in meetings is to foster open communication, support your team members' growth, and align their efforts with organizational goals.

Use this worksheet as a guide to ensure productive and meaningful discussions during your check-in meetings.

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TEAM MEMBER NAME _____

CHECK-IN MEETING SCHEDULE:

DAY _____ TIME _____

20-MINUTE WEEKLY CHECK-IN
MEETING ACTION PLAN AND OUTLINE

MEETING OBJECTIVES

- Clarify goals and expectations
- Discuss progress and challenges
- Provide feedback and recognition
- Identify support needs
- Set action items and priorities

MEETING STRUCTURE

1] Start (5 minutes):

- Begin the meeting by creating a positive and open atmosphere.
- Engage in small talk to build rapport and show genuine interest.
- Set the tone for the meeting by emphasizing its importance for communication and collaboration.

2] Goal Review (5 minutes):

- Discuss progress toward previously set goals.
- Ask the team member to share updates and any accomplishments.
- Address any challenges or roadblocks encountered.

3] Feedback and Recognition (5 minutes):

- Provide constructive feedback on the team member's recent performance.
- Highlight strengths and areas for improvement.
- Offer specific examples and suggestions for growth.
- Recognize their achievements and efforts.

4] Support and Development (2 minutes):

- Inquire about the team member's support needs.
- Discuss any training, resources, or assistance required.
- Offer guidance and suggestions for overcoming challenges.

5] Action Items and Priorities (2 minutes):

- Collaboratively set action items and priorities for the upcoming week.
- Establish clear expectations and deadlines.
- Ensure alignment with team and organizational goals.
- Discuss potential obstacles and strategize solutions.

6] Closing (1 minute):

- Summarize key discussion points and action items.
- Express appreciation for the team member's time and contribution.
- Reaffirm your availability for further support and communication.

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REFLECTION QUESTIONS

1] How will you adapt your communication style to ensure a productive and supportive check-in meeting?

2] What strategies will you implement to create a safe space for open dialogue and feedback?

3] How will you track progress and follow up on action items from each meeting?

4] How will you ensure flexibility to address unexpected challenges or urgent matters during the check-in meetings?

5] How will you balance providing guidance and support while encouraging the team member's autonomy and growth?

ACTION PLAN

Based on your reflections, outline specific actions you will take to establish and conduct effective weekly 20-minute check-in meetings with each team member:

1.

2.

3.

4.

5.

REMEMBER TO REVIEW AND UPDATE YOUR ACTION PLAN REGULARLY TO ENSURE CONTINUOUS IMPROVEMENT AND ADAPTABILITY TO CHANGING CIRCUMSTANCES.

BY FOLLOWING THIS WORKSHEET, AND TAILORING IT TO YOUR SPECIFIC TEAM AND LEADERSHIP STYLE, YOU CAN ESTABLISH A STRUCTURED FRAMEWORK FOR EFFECTIVE AND MEANINGFUL CHECK-IN MEETINGS THAT PROMOTE COMMUNICATION, SUPPORT, AND GOAL ATTAINMENT.

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