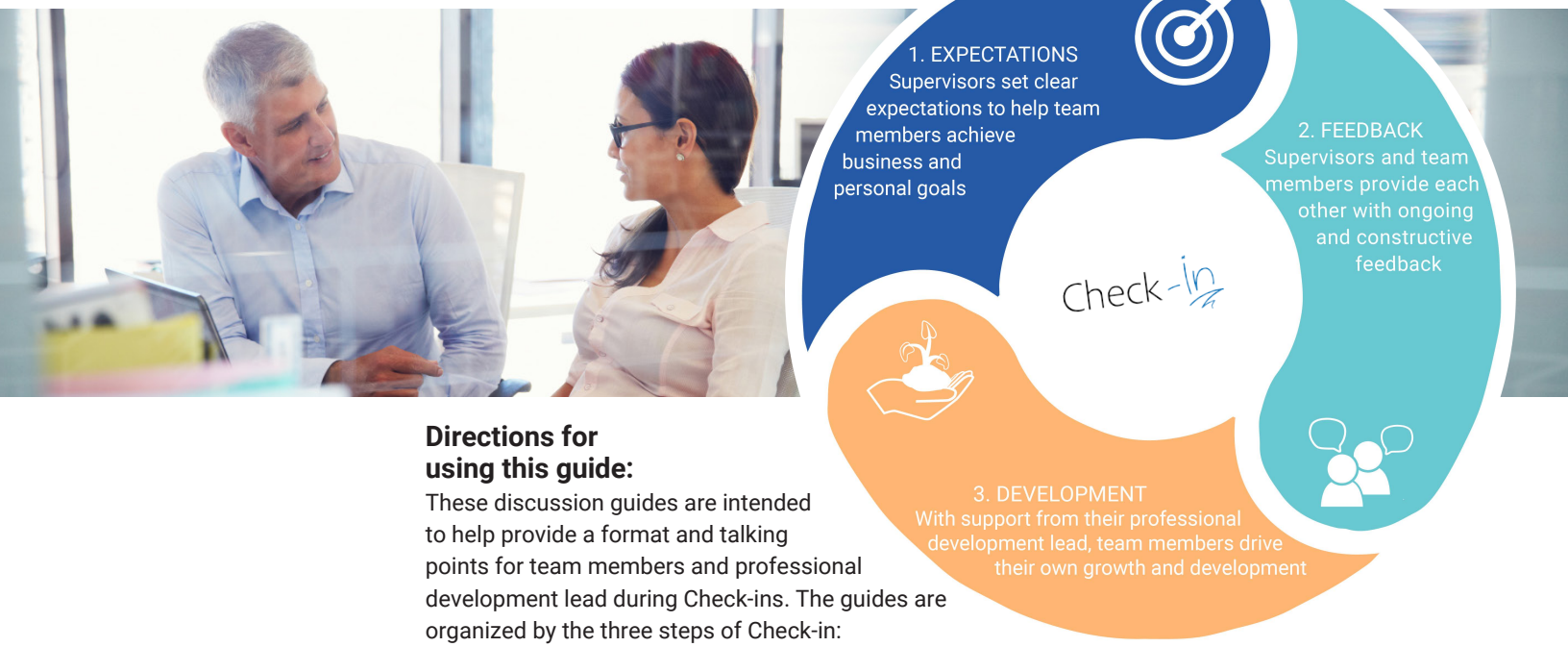
Professional Development Check-in

Expectations Discussion Guide

For Professional Development Leads



Directions for using this guide:

These discussion guides are intended to help provide a format and talking points for team members and professional development lead during Check-ins. The guides are organized by the three steps of Check-in: Expectations, Feedback and Development and provide suggestions for how to have an effective discussion. They are not intended to be a script, but to provide guidelines to prepare team members and PDLs before, during and after the Check-in conversation.

Best practices for Check-in

The purpose of Check-in is to make sure team members' expectations are clear, share feedback, and discuss development needs to enhance their performance. The flow of Check-in follows three core steps:

1. **Expectations:** First, agree what is expected of team members for the year in terms of deliverables, behavior and contributions.
2. **Feedback:** Next, provide frequent, two-way feedback to see how team members are progressing against expectations and let PDLs know if they could be doing something differently to better support the team member.
3. **Development:** Then, when team members know how they are performing, they can plan actionable goals in terms of learning, career and experience.

When should Check-ins happen?

PDLs should set up a regular cadence of Check-ins for all team members that fits the needs of their team, but the following guidelines are recommended:

- Check-ins should be scheduled at least once a quarter and typically, are 60-90 minutes long.
- Expectations should be reviewed during a Q1 Check-in to clarify objectives for the year ahead.
- Q2 and Q3 Check-ins should be focused on feedback and development. Development discussions are driven by the Team Member.
- Feedback can be provided throughout the year, not only in Check-ins.
- Development-focused Check-ins are driven by the team member and should be scheduled when they feel appropriate. Typically, development conversations may happen once or twice per year.

EXPECTATIONS: Discussion Guide for Professional Development Leads

Guidelines:

- Take time to do this well: Clear expectations are key to an effective relationship with your team.
- Where applicable, coordinate with the Team Member's supervisor to develop consistent and clear expectations.
- Check you have clarity on the expectations before having this conversation.
- Remember: Expectations must be tangible and measurable, not just aspirational.

1. Context

- Explain how the Team Member fits into the business unit and the broader business.
- Confirm the overarching goals for Object Computing this year.
- Be transparent and explain what is expected of you as PDL, the Team Member's Supervisor, and the department. Review any organizational, departmental, or team objectives for the next year.

2. Objectives

Review the Team Member's drafted OKRs and complete them together:

- "What will success look like for this objective?"
- "How will these objectives stretch you?"
- "What specific outcomes will these produce?"
- "Is this timeframe realistic?"
- "How do these goals align with the business/team objectives?"

3. Obstacles

Ensure the Team Member's Key Results are specific and measurable.

- "What obstacles could get in the way of these objectives?"
- "How will you plan to overcome these? How can I help?"

4. Review

- "When and how shall we Check-in to review progress?"
- Explain that expectations may need to evolve if the broader business goals change.
- Clarify that you will be helping them keep focus on these expectations, so it's important for them to let you know if they need to revisit them.

Follow-Through:

- Team member completes expectations worksheet.
- Evaluate and refresh throughout the year: Set expectations at the beginning of the year and review every month or quarter.
- Set up recurring calendar invites for Check-in. Avoid canceling or rescheduling these.
- Regularly update all team members with business context/changes/risks.
- Use expectations to monitor employee's progress and achievements throughout the year.

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Available at https://www.adobe.com/check-in/toolkit.html

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