



## Expectations Discussion Guide

For Team Members



### Directions for using this guide:

These discussion guides are intended to help provide a format and talking points for team members and professional development leads 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.



## Guidelines:

- Take time to do this well: Clear expectations are key to an effective relationship with your PDL.
- Use the expectations worksheet to start mapping out your objectives.
- Come to the meeting prepared to review a draft of your objectives.
- Remember: Expectations must be tangible and measurable, not just aspirational.
- Ask a lot of questions.

### 1. Context

- "Over the next period of time (e.g. sprint, quarter), what are the critical priorities that we must accomplish?"
- Check your understanding of the business context: "How does our team support Object Computing? What are your big bets for the next year?"
- "What key deliverables should I aim for this year?"

### 2. Objectives

Review your expectations worksheet with your PDL and complete your OKRs together:

- "Do you think these objectives are stretching enough for me? Am I being unrealistic?"
- "Are these properly aligned to the business objectives? If not, how can I ensure that they are?"

### 3. Obstacles

Give thought to what obstacles you might encounter while trying to accomplish your objectives. Try to identify any resources or assistance that you may require.

- "From your experience, what obstacles should I anticipate?"
- "Who else should I connect with to help achieve these objectives?"
- "What other resources do you think I will need?"

### 4. Review

- Confirm how often you would like to review progress: weekly/monthly/quarterly.
- Confirm your immediate next steps, (e.g., finalize OKRs).
- Take the opportunity to double-check your understanding of what is expected of you.

## Follow-Through:

- Finalize your OKRs and share with your PDL and supervisor
- Before your next Check-in, reflect on progress made. What has been harder/easier than you thought?
- Regularly ask for business context.
- Regularly ask for informal feedback, not only in your Check-in meetings.

## **Adobe's open-source Check-in toolkit. Published by Adobe.**

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

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