Professional Development Check-in

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.

EXPECTATIONS: Discussion Guide for Team Members

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.