

# Top tips for introducing employee check-ins

---

Performance management for the digital era



# Performance 2020

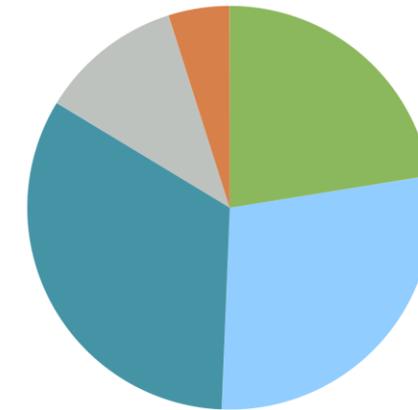
Without question, rethinking performance management has become a top priority for many HR teams.

That's because the old approach to performance just doesn't work.

Rather than find them motivational, many employees report that performance reviews are a waste of time, and an event they dread rather than look forward to.

What employees want is more frequent feedback that is 'in the moment' and validates what they are doing today, as well as equipping them to take on new challenges tomorrow.

Half of employees are either indifferent to or dread performance reviews.



● A1 ● A2 ● A3 ● A4 ● A5

A1	Look forward	—	22.47%
A2	Sometimes look forward	—	28.17%
A3	Indifferent	—	33.06%
A4	Usually dread	—	11.41%
A5	Always dread	—	4.89%

Source: 2019 Cezanne HR survey into employee attitudes to performance management  
<https://cezannehr.com/hr-blog/2019/11/uk-employees-suffering-appraisal-apathy/>

# Performance 2020

---

In response, many leading organisations have introduced check-ins: regular semi-formal conversations between employees and their managers.

The results are encouraging, with many reporting that they improve performance and productivity, keep people motivated and engaged and support talent development within the business.

Introducing a new approach that encourages a shift to continuous performance management does, however, call for preparation and planning.

This guide will take you through the **6 key steps to success**.



**Often referred to as continuous performance management, employee 'check-ins' are a series of regular conversations between managers and employees about work, progress and goals that are on-going throughout the year.**



*It's clear to us that, by having multiple Check-in conversations each year, both managers and employees are able to act more quickly when performance expectations aren't being met.*

*We've also redeployed the time managers spent administering the annual review process to more impactful Check-in conversations and important business priorities.*

**ADOBE**

# Step 1 - Secure executive buy in

Securing senior executive support for a shift to employee check-ins is the first essential step you need to take.

If line managers see the leadership team is championing the change, they are more likely to regard it as a positive move and to get on board quickly.

Emphasising the business benefits is usually the key to getting buy-in. It's about showing senior managers how continuous performance management will help the business become more agile and productive, and will make it easier to keep hold of talented people.

It's also essential to define from the start what your aims are, so that you have a baseline for measuring success.



## Helpful tips

**Here are some of the benefits you could highlight as part of your business case:**

- Clarity about priorities/goals
- More motivated people
- Better manager-employee relationships
- Just-in-time feedback
- Happier staff
- Targeted training and development
- Improved retention



*If people are the greatest creators of value in organisations, then good performance management is critical for an organisation's success. Employees need to understand what's expected of them, and to achieve those goals they must be managed so that they're motivated, have the necessary skills, resources and support, and are accountable.*

**CIPD**

## Step 2 – Spread the word

---

Make sure everyone knows about the change to employee check-ins – and understands the reasons behind the shift.

Staff may be worried that more frequent check-ins could lead to micro-management and are a cover-up for the company taking away autonomy over how they go about their jobs.

Managers may worry the introduction of check-ins is going to add to their already heavy workload, and will need reassurance about how more regular conversations will help them nip issues in the bud and avoid time-consuming problems further down the line.

If people understand the benefits of the change and what they are expected to do differently, they are more likely to buy in enthusiastically to the concept.



### Helpful tips

Remember to focus on ‘what’s in it for me’ and make sure you arrange briefings for managers and their teams together, so that there’s no confusion and everyone is clear about what the shift will look like in practice.



*Gallup research shows that when employees know and use their strengths, they are more engaged (nearly six times more), have higher performance and are much less likely to leave their company.*

**GALLUP**

## Step 3 – Provide training

---

Don't assume that all employees will be comfortable with the shift to more regular dialogue and a coaching approach.

Some managers will need support with understanding how to set goals, manage expectations and give effective feedback – or how to make decisions or recommendations about promotions or pay rises.

And, if employees are to get the most out of the move to continuous performance management, they also need to understand how it works, what their role in the process should be and how they can use conversations to support their career development.

Training doesn't have to be complicated or expensive. HR could run a series of lunchtime sessions or a half-day workshop, for example, supported by signposting to internal or external resources or information.



### Helpful tips

Highlight the company's approach to check-ins in your induction programmes, so that new starters are joined up with the process from day one.

## Step 4 – Make it easy for managers

---

Check-ins will only work if line managers are fully onboard. That's not always easy to achieve, even with training. However, asking senior executives to lead by example can make a big difference – as can making it explicit that this is part of their job description.

It's also important to make it easy for managers by giving guidance on how to decide how often discussions should take place, and the kind of questions they can ask. For some teams, once a month may be enough – while depending on the nature of their work, others may need to check-in more frequently.

Check-ins don't have to take long – the key is to make sure the discussion focuses around what will have the most impact on how effectively the individual can do their job.



### Helpful tips

Consider putting together some templates to guide managers through discussions.

Looking for inspiration? Take a look at these [check-in questions](#).



*The manager is the vessel that makes culture change and engagement a reality. Managers are closer than HR or leadership to employees' daily realities, so they're more likely to understand how to develop employees and engage them. And since people are more likely to learn and grow when they receive immediate feedback that is specific and targeted to their development, managers become the perfect people to coach employees and link them to practical learning and action.*

**GALLUP**

## Step 5 – Go digital

---

Don't let check-ins turn into yet another time-consuming paper-based process, or a tick-box exercise that doesn't make a difference.

The latest HR software provides a collaborative, on-line space, where employees and their managers can record goals, make sure progress is on track, and make a note of any support and development that's been discussed and agreed.

These systems can be set up to nudge managers when check-ins are due, and allow employees to update progress or request feedback in between times if they want to clarify changing priorities or need coaching through a task or project.



### Helpful tips

HR software need not be expensive, with modern Cloud systems now available from just a few pounds per employee per month.

[See HR software pricing.](#)



*A mixed-methods study of employers' use of Performance Management systems has shown that the values employers and staff consider most important to effective performance arrangements are: transparency, consistency, fairness.*

**ACAS**

## ✔ Step 6 – Monitor and encourage

---

Don't expect overnight success. Embedding any new process takes time and persistence and it will be a while before the shift to continuous performance management beds in.

The key is to keep communicating about the process – and check in regularly with managers to ask how they are finding it so you can help them iron out any issues.

Share examples from within the business of where check-ins are working really well and find ways to 'nudge' those who are slow on the up-take into action. You could create a leader board showing the number of check-ins that have been completed by individual departments, for example, or encourage managers who are keen advocates to mentor those who haven't yet embraced the concept.

Sharing stories from within the business of where the approach has been really successful can help, too. If managers can see their peers have been able to raise productivity within their teams, they will be encouraged to follow suit.





# Key takeaways

---

Ready to get started with performance check-ins? Just remember these 6 helpful tips.

- Get executive buy in and make sure aims are agreed
- Communicate benefits before and after roll-out
- Provide training for all participants
- Pay special attention to managers
- Boost engagement (and reduce admin) by going digital
- Share success and nudge when needed!





# Modern HR software for today's connected organisations

---

To find out how Cezanne HR's software can help you achieve your HR objectives, [book a demo today](#).