



## The Mid-Year Employee Check-In: Why It Matters and How to Do It

### Description

Over the years, with the companies I am part of, we have put in place a mid-year check-in with all employees. It starts with me checking in with my direct reports and cascades to everyone in the organization. The questions vary slightly depending on whether a person is full-time or part-time.

This conversation does not replace the need for consistent communication between the supervisory and the work group. It is also not an evaluation, though it certainly provides the opportunity for two-way feedback and mid-year course adjustments if need be.

When researching employee engagement, it is clear that communication, feedback, development, and the sense that “my boss cares about me as a person” set the foundation for an employee’s commitment to the organization’s goals, their productivity, and their retention. I find many leaders feel they are engaging the employees they lead because they have frequent interactions. This is good and needed. However, taking time for one-on-one check-ins, with specific questions, deepens the relationship.

The process is this: All employees receive the questions ahead of time and are asked to answer the questions to prepare for the session with their supervisor. The questions are distributed along with a letter explaining that this is not an evaluation, but a mid-year check-in. A time that these questions are to be completed is also given.

Here are the questions:

1. Since the start of this year (or, if someone has just joined the company this year, since their start date), what do you enjoy most about working within the organization? (This is an important one to start with for it can be human nature to start out with what is not liked versus liked.)
2. What do you feel the organization does well?
3. What suggestions do you have for the organization to be better?

4. What skill or area do you do well in that you feel you could help mentor/teach others in the organization?
5. Is there any training or education you feel would be beneficial to you in your current role?
6. Do you have the tools and resources you need to do your job?
7. As your supervisor, what am I doing that you find helpful? What suggestions do you have for me, so I can be a better leader?
8. On a scale of 1-10, with 10 being the highest, rate your overall engagement. (Engagement means working toward the organizational common goals).

The questions are similar for part-time employees, with a few differences. Write me at [quint@quintstuder.com](mailto:quint@quintstuder.com) if you would like a copy. Thirty percent of the staff are part-time, so both full-time and part-time conversations and engagement are vital to having a great, high-performing organization. The customers do not evaluate service on whether a person is full-time or part-time.

What do these mid-year check-ins accomplish? First, most of the time, the staff share they have never had a mid-year check-in. Doing one demonstrates caring, shows commitment to input and development, and builds the relationship.

The first two questions help the employee see what is right about the company.

The check-in also shows a sincere commitment to the employee and proves that their supervisor wants to be better. It leads to ideas and suggestions. It creates better processes, productivity, clarity, and performance.

The key is to train managers on digging into the answers, so it is not a “checking-the-box” conversation.

Here are a couple of examples:

D.C. Reeves, the chief entrepreneur officer of Studer Community Institute’s The Spring, did a mid-year check-in with Gracie Woodfin, the coordinator of The Spring. Gracie shared that she would like to receive more development in presentations. Thus, Gracie will now be enrolled in a presentation skill-building program with a coach.

Jonathan Griffith, president of Studer Entertainment & Retail, reports to me. Under the question “What can I (as your supervisor) do better?” Jonathan shared that I tend to get ahead of him with announcements, and it does not leave him the time he needs to inform the staff. Since then, I have been very cognizant of that issue. It is helping me to slow down, hold discussions with him, and create better roll-out plans. It has led to Jonathan’s taking the lead versus me. This is an example of that “bury-the-ego” item I share often. It is important for a leader to not be defensive or rationalize their actions.

A few tips:

1. Create a mid-year feedback system for those you supervise. If your company already has one, great! If not, take ownership and develop one. Too often an excuse can be "No one else is doing it." Show the impact, and more will.
2. Ask the person to answer the questions in writing prior to the session. It adds a great deal of quality to the conversations.
3. Explain that this is not an evaluation; it is a development conversation for both parties. A check-up description seems to connect well with people.
4. Be careful not to be defensive about ways you can improve. It takes some courage to suggest development opportunities to one's supervisor. Role model how you want others to respond to your coaching.
5. Take your time. It is not a checklist. Ask clarifying questions.
6. Come back to the session as the year goes along. Use terms such as "Based on our mid-year session, how is the training you requested going?" or "Based on the mid-year conversation, can you be a mentor to \_\_\_\_\_?" or "Thank you for the mid-year feedback. Are you seeing any improvement?"

Mid-year check-ins are so effective in creating a better workplace. A better workplace equals better results.

Even though it is August, you still have time to implement mid-year check-ins. Please let me know how it goes.

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