



# Guide to check-in meetings



Check-in meetings are recurring meetings between a manager and their direct report, that ideally go beyond simple status updates or performance conversations. The goal is to create better alignment, productivity, motivation, and growth – but getting there requires managers and employees to talk honestly about things that impact their work and experience.

These conversations might require touching on what the employee finds challenging, what they find rewarding, the state of their wellbeing, or even the strength of their work relationships. But just because these interactions are conversations doesn't mean they're 'just' conversations.

For many managers, uncertainty about length, frequency, conversation topics, or tone can make check-in an intimidating and feared responsibility.

In this guide from the Mental Health Foundation, we share tips to facilitate more meaningful, continuous conversations between managers and direct reports. This will help you better support staff wellbeing, manage performance, and develop good work relationships.

## Check-in pitfalls to avoid

The most important part of conducting a check-in is that managers respect and have empathy for the person they're meeting with. This might sound obvious, but when a manager is juggling a dozen different tasks, it can be difficult to be truly present and engaged. To make this a bit easier, here are four common pitfalls for managers to be wary of:

### Lacking structure (or purpose)

Find the right structure and define the purpose of a check in to ensure everyone knows what to expect. This is especially important when sensitive topics need to be discussed.

### Focusing on themselves

Check-ins are not meant to be about managers. The best, most impactful results come when managers highlight the agenda topics that are most important to their direct reports, and by listening and offering guidance when asked. This requires a conscious effort on the part of managers to speak less than they listen. 70:30 is a great listening-to-speaking ratio to follow.

### Skipping meetings

Check ins should be at the very top (and firmly in the 'do not skip' category) of a manager's priority list. De-prioritising these meetings sends a message that their direct reports are undervalued or unimportant.

### Rushing through feedback

When managers need to deliver feedback, they should make sure to prepare for it and dedicate enough time to it during the meeting. This ensures the feedback given is accurate, clear, and properly actionable – and that there's enough time set aside for the direct report to be able to discuss it.



## Running check-ins with confidence

You might've noticed a common theme running through our list of 'pitfalls to avoid': the importance of preparation. Preparation is what differentiates a productive discussion from an aimless chat. Whether it's a manager's first check in with a direct report or their hundredth better preparation will produce better outcomes.

**Preparation isn't just for managers:** to get the most out of 1-to-1's, staff should spend time preparing what they want to discuss ahead of the meeting.

Here's a step-by-step guide that'll help managers prepare and run effective check-ins - this isn't about telling anyone how to do their job, it's about providing better tools to support them in their role.

### The manager's checklist for effective check-ins

#### Setting the context of a check-in

- Discuss the importance and benefits of check ins. This can help them understand the value and dedicate the appropriate amount of focus.
- Allow staff to co-create and own the purpose of the meetings. Ask them to consider how both parties could work together to make sure the direct report gets the most value out of the meeting.
- Agree on duration and frequency. We suggest regular check-in every 4 weeks but no longer than 6 weeks that run for 30 to 60 minutes The important thing is to maintain a regular frequency.
- Agree on an overall structure that still allows room to deviate if something comes up that they'd like to discuss.
- Establish where, when, and how you'll meet – i.e., Teams, in person meeting room, or even going outside of the office or workplace. Always ensure that the space allows for privacy and confidential conversations.
- Be willing to adjust all the above as you learn what works best.

#### Prepare in advance

- Agree on a shared agenda in advance
- Consider any achievements that should be recognised or any feedback you might have for your direct report. Practice how to phrase your feedback.
- Avoid rescheduling the meeting at the last minute – your direct report must have a consistent meeting where they get their manager's attention and focus.



## Create the right environment

- Set the tone. Be punctual and warm from the moment you join the meeting. Remind them that this is their time and set the tone to communicate openness and safety.
- Stay present. Remove any distractions: move away from workstations and silent phones or laptops. Make your direct report feel that they're your priority.
- Ask questions – especially open-ended questions. Stay focused on the direct report, try to avoid shifting the conversation to yourself or others unless truly necessary.
- Keep notes of the key points and actions that you can refer to later. Seek clarity (or set out examples) where necessary to ensure understanding.

## What to cover in the meeting

- Start by asking how they're doing, and do an overall work check-in.
- Confirm the agenda is still as planned.
- Ask for a follow-up on previous meeting actions and learnings
- Ask about key successes or highlights from the week. Acknowledge any of your direct report's achievements, or instances where they contributed value.
- Check-in on key areas like their wellbeing, growth and learning, work relationships, productivity, capacity, and challenges
- Ask follow-up questions if further clarity or understanding is needed on a particular point
- Ask for feedback on your role as manager, using questions like 'what is working well?', 'what is one thing I can do differently?', or 'what could I do more / less of?'

## The final five minutes: wrapping up the check-in

- Recap the meeting and close with agreed-upon actions for each person to follow-up on.
- Reflect on how the meeting went, and capture any valuable insights to apply in your notes.

## Everyone deserves good mental health

Our publications are used by businesses and organisations across the UK, helping thousands of people manage and maintain their mental health. They're free to download and also available to buy in print.

[mentalhealth.org.uk/publications](https://mentalhealth.org.uk/publications)

How to  
**support**  
mental health  
**at work**

