

Guide for Preparing Employees to Connect

EMPLOYEE PREPARATION WORKSHEET

Instructions: Give this worksheet to your direct report before your check-in session to help him or her prepare for the first development connection meeting.

Questions to consider:	Your thoughts:
What basic information might be useful to gather during your first meeting? (e.g., day/time, name, role, skill focus)	
How many times and how frequently are you planning to meet with him/her?	
What experiences do you have that you can leverage during this partnership?	
What questions can you ask to frame up a problem or issue in a new way?	
What type of feedback could you ask for?	
By what date will you be ready to talk about how you're applying what you've learned in your role?	

Source: CEB analysis.

SETTING CLEAR EXPECTATIONS

Instructions: Use the scripting, questions, and checklist below to help you prepare for a pre-connection check-in with your direct report.

Sample check-in conversation

- These are the one to two actions you should focus on to reach a higher level of performance.
- To help you learn what doing this well looks like, I want to connect you with a network of peers and other leaders who have demonstrated these behaviors in previous projects very effectively.
- After you've had a chance to reflect on your experience, we'll discuss strategies to demonstrate the skills you've learned in your role.

Possible questions to ask during your check-in

1. What experiences, knowledge, or insights do you have that you can leverage during this conversation?
2. What thoughtful questions have you prepared?
3. How will you provide feedback to the person you're connecting with?
4. How might you question your connections' ideas and opinions?
5. How will you keep track of what you're learning from these sessions?

Checklist of items to cover during your meeting

- Identifying employee's strengths and the development opportunities this connection will address.
- Brainstorming thoughtful questions to ask during the meeting.
- Thinking through what might be challenging about the experience.
- Setting clear expectations for development outcomes with the employee.
- Establishing a timeline to check in on progress.

Source: CEB analysis.