

A Manager's Checklist for Employee Check-ins

A comprehensive checklist to help build stronger manager-employee relationships

Effective manager-employee relationships can significantly reduce workplace stress, enhance problem-solving capabilities, and facilitate navigation through organizational changes. Investing in these relationships not only boosts individual and team performance but also contributes to a more resilient and adaptable organization.

How to Check-in with Your Team

Regular check-ins with employees are a critical component of effective management, particularly when it comes to employee well-being and workload.

Managers should ensure these conversations are consistent, focused, and tailored to individual needs, to build trust and demonstrate a genuine commitment to their team's well-being and professional growth.

Follow this checklist to help guide you through your employee check-ins:

- ☐ **Review Previous Meetings:** Quickly go through notes from past meetings to track ongoing issues or progress.
- ☐ **Gather Feedback:** If applicable, collect feedback from colleagues who work closely with the employee to understand their current work dynamics.
- ☐ **Set an Agenda:** To focus on mental health and workload, prepare to be flexible if the employee brings up other concerns.



- ☐ **Create a Welcoming Atmosphere:** Start with a casual conversation to make the employee feel comfortable.

Employee Mental Health Check-In

Here are some examples of questions about mental health you can ask during employee check-ins. It's essential to approach these discussions with empathy, recognizing the unique circumstances and needs of each employee.

- ☐ *"How are you feeling lately, both inside and outside of work?"*
- ☐ *"Have there been any recent changes in your life affecting your well-being?"*
- ☐ *"What aspects of your job are currently causing you the most stress?"*
- ☐ *"How manageable do you find your current work-related stress?"*
- ☐ *"Do you feel supported by your team and the broader company?"*
- ☐ *"Are there additional supports or resources you feel could help you manage better?"*
- ☐ *"How are you finding the balance between work and personal time?"*
- ☐ *"Are there any challenges you're facing in maintaining a healthy work-life balance?"*

Workload Assessment

Here are questions you can ask about your employee's current workload:

- ☐ *"How do you feel about your current workload?"*
- ☐ *"Are there specific tasks or projects that feel overwhelming or unmanageable?"*
- ☐ *"Do you need help with prioritizing your tasks?"*
- ☐ *"Are there any deadlines that are causing concern?"*
- ☐ *"Do you have the resources and tools needed to effectively manage your workload?"*
- ☐ *"Is there any additional support from the team or myself that you need?"*
- ☐ *"How are you finding the tasks assigned to you? Are they aligned with your skills and interests?"*
- ☐ *"Is there any task you wish to delegate or share with a team member?"*

Closing the Meeting

- ☐ **Actionable Steps:** Summarize the main points discussed, any actionable steps and timelines for follow-ups.
- ☐ **Open Door Policy:** Reiterate your availability for support and encourage the employee to come forward anytime they need assistance or wish to discuss further issues.
- ☐ **Schedule Next Meeting:** Agree on a preferred day and time for check-ins to occur regularly.



Strong manager-employee relationships built on mutual respect, trust, and open communication serve as the foundation for team cohesion, employee engagement, and overall job satisfaction. When managers and employees have a solid rapport, it leads to a more transparent exchange of feedback, allowing for constructive discussions on performance, expectations, and growth opportunities.