Adobe’s Check-in Framework: Guidelines for Making Check-in Successful

Summary

This artifact is part of an exclusive suite of content and resources related to a presentation given by Ellie Gates, Director of Global Management Effectiveness & Performance, at Adobe Systems, on September 25, 2013 at HCI’s Employee Engagement Conference. When Adobe decided to eliminate their traditional annual performance review process and replace it with the simplified, more frequent Check-in approach to performance management, several documents were created to provide employees, managers and leaders with guidelines for each of the three Check-in components (Expectations, Feedback and Growth/Development).

This artifact features a document designed to provide guidance for employees and managers on how to make each component of the Check-in framework effective.
Making Check-in Successful

This page summarizes important activities and defines manager/employee responsibilities for each of the three Check-in components.

Check-in Approach
Check-in is Adobe’s approach to ensuring employees and managers to have ongoing feedback conversations around expectations, performance against them, as well as growth & development opportunities.

Responsibilities
- Managers are expected to drive the key aspects of Check-in that relate to performance: Setting Expectations and providing Ongoing Feedback, and where necessary performance coaching. Employees also play an active role in this process.
- Employees are responsible for driving the discussions around their need for development and aspirations for GROWTH.

Keys to Making Check-in Successful

1. EXPECTATIONS
   - Employees should be clear on what is expected of them.
   - Write down expectations at the beginning of the fiscal year revisit them often to ensure they are still relevant.
   - Review expectations in 1:1s or have a separate Check-ins to review and get feedback in a rhythm that makes sense for your business. Make sure you call out that this is a Check-in. (i.e. in Sales/G&A it may make sense Quarterly while in Engineering they may make sense to review at the beginning and end of each sprint).
   - Managers are responsible for making sure these are set and documented for each employee. Employees should keep a copy of these as well.

2. FEEDBACK
   - Employees require ongoing feedback and coaching from their managers about their performance: what is working, and what needs to be improved.
   - Employees should solicit feedback regularly from their manager and colleagues to continue to improve. Employees should solicit/give feedback to their manager and colleagues as well.
   - Managers are accountable for providing specific, actionable, and timely feedback around performance and in alignment with the expectations that have been set.
   - Should an employee struggle to perform adequately against expectations, managers should enlist the help of the appropriate People Resources team for assistance in helping assess how to get performance back on track, and for counsel in performance coaching.

3. GROWTH:
   - Growth & Development starts with a focus on what employees can do to perform well in their current role.
   - Employees are responsible for driving the conversation around their need for skill development, and aspirations for growth in the future.
   - Employees own creation of their development plan. Development should be focused on ensuring you strengthen the skills needed in your current role and also those skills you aspire to build.
   - Managers should support the growth and development of employees skills in their current role.
Tips for Managers and Employees:

Making Check-in Successful

**Practical Tips for Managers:**
1. Schedule dedicated Check-in meetings that are focused on discussing overall performance and development (as opposed to tactical 1:1 discussions that can be ongoing)
2. Provide insights to their role and value to the "big picture"
3. Ask the employee for feedback on you as a manager, the support you are providing, and what you can do to better support them
4. Don’t do all the talking – Listen and ask questions for clarity
5. Gain an understanding of the individual’s career aspirations

**Practical Tips for Getting Started (Employees):**
1. Ensure you are clear on what is expected of you and what success looks like
2. Don’t be a victim – if your manager isn’t driving discussions on expectations or providing you feedback ask for it
3. Provide feedback to your colleagues and manager frequently on what is working/could be better
4. Share your development needs with your manager and aspirations for the future
5. Prepare for discussions around growth by identifying strengths you can build on, and areas where you'd like to develop in the business
Additional Related Resources

Full Keynote Presentation:
- **Shifting Manager and Employee Mindset to Increase Engagement**
  Presented by Ellie Gates, Global Director of Management Effectiveness & Performance, Adobe Systems

Keynote Highlights
**(a shorter version of the Keynote recording that highlights major teaching points):**
- **Keynote Highlights: Adobe’s “Inside-out” Revolution Against the Annual Performance Review**

Executive Insight Videos
**(a series of short interviews with Ellie Gates):**
- Adobe’s “Check-in” Performance Framework Pt. 1: Let’s Blow up the Annual Review
- Adobe’s “Check-in” Performance Framework Pt. 2: Employee-driven, Manager-supported Development
- Adobe’s “Check-in” Performance Framework Pt. 3: Global Implementation and Continuous Improvement

Executive Summary
**(a high level summary of the keynote presentation):**
- How Adobe’s New Performance Management Framework Drives Engagement and Retention

Artifacts and Tools
**(examples and templates provided by Adobe to put ideas into action):**
- Adobe’s Check-in Framework: Learning Reference Card
- Adobe’s Check-in Framework: Guidelines for Setting Expectations
  - Expectations Form (TEMPLATE)
- Adobe’s Check-in Framework: Guidelines & Tips for Giving/Receiving Ongoing Feedback
  - Giving/Receiving Feedback Form (TEMPLATE)
- Adobe’s Check-in Framework: Guidelines for Growth & Development
  - Individual Development Plan (TEMPLATE)
- Adobe’s Check-in Framework: Rewards Learning Reference Card
- Adobe’s Video Series on the Check-in Framework