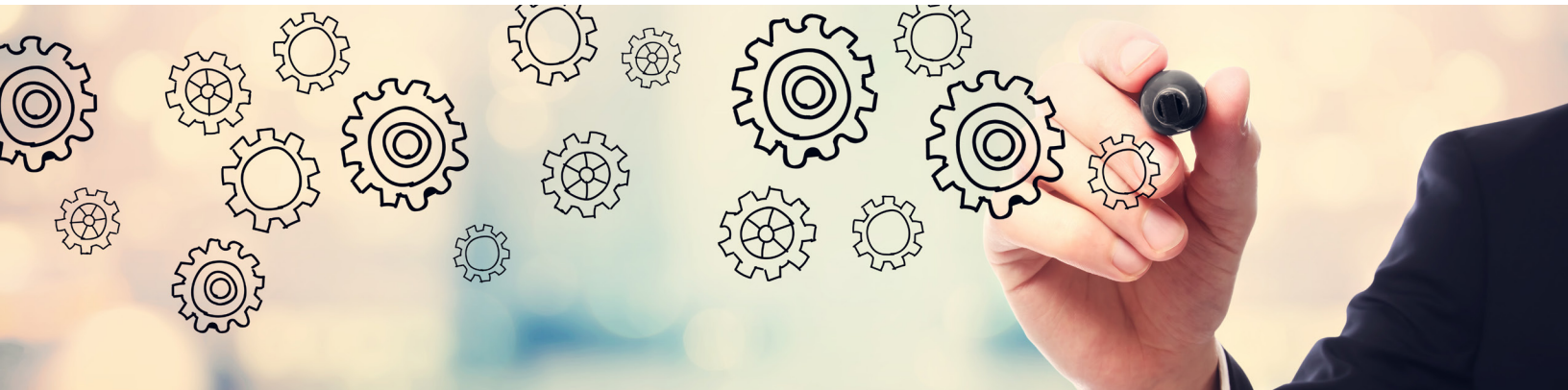# Adobe's Check-in Toolkit

We've developed a number of guides and worksheets to help make Check-in successful. They align to the three phases of Check-in – Expectations, Feedback, and Development. The following documents are enclosed in this toolkit.

Expectations
- Expectations discussion guide for employees
- Expectations discussion guide for managers
- Expectations worksheet

Feedback
- Feedback discussion guide for employees
- Feedback discussion guide for managers

Development
- Development discussion guide for employees
- Development discussion guide for managers
- Individual development plan

Expectations Discussion Guide
For Employees

1. EXPECTATIONS
Managers set clear expectations to help employees achieve business and personal goals

2. FEEDBACK
Managers and employees provide each other with ongoing and constructive feedback

3. DEVELOPMENT
With support from their manager, employees drive their own growth and development

Check-in

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- Development-focused Check-ins are driven by the employee and should be scheduled when they feel appropriate. Typically, development conversations may happen once or twice per year.

EXPECTATIONS: Discussion Guide for Employees

Guidelines:

- Take time to do this well: Clear expectations are key to an effective relationship with your manager.
- Use the expectations worksheet to start mapping out your goals.
- Come to the meeting prepared to review a draft of your SMART goals.
- Remember: Expectations must be tangible and measurable, not just aspirational.
- Ask a lot of questions.

1. Context

- "Over the next period of time (e.g. sprint, quarter), what are the critical priorities that we must accomplish?"
- Check your understanding of the business context: "How does our team support Adobe? What are your big bets for the next year?"
- "What key deliverables should I aim for this year?"

2. SMART

Review your expectations worksheet with your manager and complete your goals together:

- "Do you think these goals are stretching enough for me? Am I being unrealistic?"
- "How will I be measured on these?"
- "Are these properly aligned to the business goals? If not, how can I ensure that they are?"

3. Obstacles

Have specific tasks tied to the expectations. Not just what will be achieved, but HOW.

- "From your experience, what obstacles should I anticipate?"
- "Who else should I connect with to help achieve these expectations?"
- "What other resources do you think I will need?"

4. Review

- Confirm how often you would like to review progress: weekly/monthly/quarterly.
- Confirm your immediate next steps, (e.g., finalize SMART goals).
- Take the opportunity to double-check your understanding of what is expected of you.

Follow-Through:

- Finalize your expectations and share with your manager.
- Before your next Check-in, reflect on progress made. What has been harder/easier than you thought?
- Regularly ask for business context.
- Regularly ask for informal feedback, not only in your Check-in meetings.

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EXPECTATIONS: Discussion Guide for People Managers

Guidelines:

- Take time to do this well: Clear expectations are key to an effective relationship with your team.
- As a manager, you will drive the expectation setting process.
- Check you have clarity of your own expectations before having this conversation.
- Remember: Expectations must be tangible and measurable, not just aspirational.

1. Context

- Explain how the team fits into the business unit and the broader business.
- Confirm the overarching goals for Adobe this year.
- Be transparent and explain what is expected of you as a manager of this team. Explain your big bets for the next year.

2. SMART

Check that the goals the employee has drafted are SMART and complete them together:
- "What will success look like for this goal?"
- "How will these goals stretch you?"
- "What specific outcomes will these produce?"
- "Is this timeframe realistic?"
- "How do these goals align with the business/team goals?"

3. Obstacles

Ensure the employee has specific actions tied to the expectations. Not just what will be achieved, but HOW.
- "What obstacles could get in the way of these goals?"
- "How will you plan to overcome these? How can I help?"

4. Review

- "When and how shall we Check-in to review progress?"
- Explain that expectations may need to evolve if the broader business goals change.
- Clarify that you will hold your employee accountable to these expectations, so it's important for them to let you know if they need to revisit them.

Follow-Through:

- Employee completes expectations worksheet.
- Evaluate and refresh throughout the year: Set expectations at the beginning of the fiscal year and review every month or quarter.
- Set up recurring calendar invites for Check-in. Avoid cancelling or rescheduling these.
- Regularly update all employees with business context/changes/risks.
- Use expectations to monitor employee's progress and achievements throughout the year.

Expectations Worksheet

What are expectations?

Setting expectations is the first of three steps in Adobe's Check-in process: You and your manager agree upon key deliverables, behaviors and results for the fiscal year.

Employees are required to set goals based on these expectations. Goals define the specific steps employees will take to meet the expectations.

Employees and managers should review expectations regularly to ensure they remain relevant as business priorities and circumstances change.

Employee & manager responsibilities

- The manager is responsible for ensuring that employees receive clear expectations that are aligned with key business needs and priorities.
- The employee is responsible for drafting appropriate goals that align to each expectation and to review these regularly with his/her manager.
- Both the manager and employee provide constructive feedback on what's working and what could improve.

Getting started:

1. Managers discuss and set clear expectations with their employees
2. Employees draft SMART goals to fulfill business expectations
3. Employees review and refine goals with their manager
4. Managers and employees ask for and give frequent feedback on performance against expectations
5. Managers and employees revisit and revise your expectations in Check-Ins throughout the year

SMART is an acronym that can help you and your manager identify the associated goals and success criteria for each of your manager's expectation.

SPECIFIC: Who, what, where, when, and why of the achievement
MEASURABLE: Clear measures of success, key metrics and milestones
ATTAINABLE: Achievable, and also provides a stretch opportunity to develop and grow
RELEVANT: Results focused, aligned to Org/BU priorities, and produces tangible results
TIME-BOUND: A due date gives focus and sense of urgency to the work

Instructions

Identify the specific goals associated with each of your expectations. Describe the goal, success and measureable results, and the associated due dates or milestones. If you require additional pages, please print or save multiple versions of this document.

EXPECTATION:

GOAL 1:	DEFINE SUCCESS:	DUE DATES:
GOAL 2:		
GOAL 3:		

EXPECTATION:

GOAL 1:	DEFINE SUCCESS:	DUE DATES:
GOAL 2:		
GOAL 3:		

EXPECTATION:

GOAL 1:	DEFINE SUCCESS:	DUE DATES:
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Feedback Discussion Guide
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Check-in

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FEEDBACK: Discussion Guide for Employees

Guidelines:

- As an employee, you will be part of a two-way feedback conversation.
- Provide timely, specific, balanced feedback.
- Don't give feedback when you are angry.
- Ask lots of questions to ensure you are clear about the feedback you're receiving.
- Remember: Constructive, critical feedback is often the most helpful to people. Don't avoid the tough conversations and be open to hearing difficult feedback.

1. Specifics

- "What do I do well that makes me effective? Why is that impactful?"
- "Are there any areas of performance concern that I need to be aware of?" Ask for specific examples.
- When providing feedback, state the specific facts that you know: "I have observed that you do/say _____and it impacts me in this way _____."

2. Ask

- Pause and take time to respond to the feedback.
- Ask for suggestions:
  - "What should I stop, start, continue to do?"
  - "What is one thing, looking forward, I could change or do more of that would make me more effective?"

3. Impact

- When receiving feedback, consider the impact of your behavior on the situation/team. Do you need to take further action to change that impact?
- When providing feedback, describe the impact you observed on other people, both positive and negative.

4. Do

Collaboratively agree on what needs to continue or change:

- What will you do differently in the future?
- What help/support would you like from your manager or others to help you stay on track?
- Say thank you for the feedback.

Follow-Through:

- Put agreed-upon changes into action.
- Before your next Check-in, consider what feedback you would like to provide.
- Regularly ask for business context, changes, and risks.
- Regularly ask for informal feedback, not only in your Check-in conversations.

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FEEDBACK: Discussion Guide for People Managers

Guidelines:

- As a manager, you will be part of a two-way feedback conversation.
- Provide timely, specific, balanced feedback.
- Show genuine appreciation for your team members and the value they bring to the team.
- Motivated employees want to know how they're doing, tell them!
- Don't give feedback when you are angry.
- Remember: Constructive, critical feedback is often the most helpful to people. Don't avoid the tough conversations and be open to hearing difficult feedback.

1. Specifics

Provide specific feedback based on your observations:

- "X is something you do very effectively."
- "I really appreciate your contributions to (project/team/BU) by doing X."
- "Looking forward, if you could change or do more of X it would make you more effective."

2. Ask

- PAUSE and ask for the other person's reaction.
- Ask open-ended questions to understand their perspective:
    - "If you could do it again, what would you do differently?"
    - "How did you feel following that situation?"

3. Impact

- When receiving feedback, consider the impact of your behavior on the situation/team. Do you need to take further action to change that impact?
- When providing feedback, describe the impact you observed on other people, both positive and negative.

4. Do

State or collaboratively agree on what needs to continue or change:

- "Can I make a suggestion?"...
- "What help/support would you like from me to help you stay on track?"
- "What feedback do you have for me?" – remember to say thank you for feedback received.

Follow-Through:

- Put agreed-upon changes into action.
- Regularly provide informal feedback to team members – after meetings, presentations, etc.
- Appreciate your team often and in a way that is meaningful for each of them.
- Remind your team that you are open to hearing their feedback.

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DEVELOPMENT: Discussion Guide for Employees

Guidelines:

- Expectations and Feedback Check-ins must happen before a development conversation.
- Reflect on interests and aspirations (use Individual Development Plan).
- Schedule meeting with your manager. You will likely have a series of meetings, not just one.
- Come to the meeting with some clear ideas to discuss.
- Remember this is a journey: don't move straight to action.

1. Current State

- Explain what you find most and least satisfying about your current role and why.
- Discuss other things you really enjoy doing and why.

2. Strengths

- Explain what you believe your strengths and development areas are.
- "Does this align with your perspective? Is there something I'm missing?"

3. Aspirations

- Explain your short-term (up to 12 months) and long-term (2-5 years) career aspirations.
- "What do you think could be a logical career step for me at Adobe?"
- "How well do you think my aspirations link to Adobe's goals?"

4. Plan

- "I've identified some experiences, coaching or learning to help me develop. What do you think is missing?"
- Discuss the potential results/business impact of these activities.
- "How did you develop your own career?"

5. Action

- Discuss specific actions you can take to achieve your goal(s).
- Agree upon a realistic timeframe and how to track progress against actions.
- Consider potential obstacles and how you will overcome them.

Follow-Through:

- Employee completes Individual Development Plan (IDP).
- Schedule a follow-up meeting with manager to review progress.
- Ideally, you should review development plans every 3-6 months as part of Check-in.
- Explore online resources and internal opportunities (roles, transfers, projects, etc.).
- Before your next development Check-in with your manager, reflect on the progress you've made.

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DEVELOPMENT: Discussion Guide for People Managers

Guidelines:

- Expectations and Feedback Check-ins must happen before a development conversation.
- Encourage don't direct.
- Support employees on their development journey.
- Provide business context.
- Listen 70%/Talk 30%.
- Provide clarity, but don't feel like you have to have all the answers.
- Remember this is a journey: don't move straight to action.

1. Current State

- "What parts of your current job do you find most satisfying and why?"
- "What parts are less satisfying and why?"

2. Strengths

- "What are your key skills and strengths?"
- "What is a critical development area for you?"
- "What business trends or skills do you need to learn more about to remain relevant?"

3. Aspirations

- "What are your short and long-term career goals?"
- "Let's look at how your aspirations link to Adobe's goals."
- "Do you have a specific career move that you want to make?"
  (Specialist to expert, buddy to boss, international moves, etc.)

4. Plan

- "What types of experiences, coaching, and/or learning do you need to fulfil your aspirations?"
- "What will be the potential results/business impact of these activities?"
- "As your manager, how can I help?"

5. Action

- "What specific actions can you take to achieve your goal(s)?"
- "What obstacles, if any, may get in the way?"
- "How would you like us to monitor your progress against these goals?"

Follow-Through:

- Employee completes the Individual Development Plan (IDP).
- Guide employee to online/on-demand resources.
- Explore internal opportunities (roles, transfers, projects).
- Confirm date for next development Check-in to review progress.
- Ideally, you should review development plans every 3-6 months as part of Check-in.

Individual Development Plan
(IDP)

Objective:
Create a personal development plan that aligns your strengths, career aspirations and business needs.

Reflect on the questions below prior to your development discussion with your manager.

WHAT PARTS OF YOUR JOB DO YOU FIND MOST SATISFYING?	
Most Satisfying?	*Why?*

WHAT ARE YOUR KEY SKILLS OR STRENGTHS?	WHAT SKILLS OR STRENGTHS DO YOU WANT TO DEVELOP?

WHAT ARE YOUR SHORT AND LONG-TERM CAREER GOALS?	
This includes experiences you would like, not just promotions (e.g., running an event, speaking at a conference, or managing a team)	
Short Term (6-12 months):	*Long Term (2 to 5 years):*

WHAT TYPE OF ASSIGNMENTS, EXPERIENCES, COACHING AND/OR LEARNING DO YOU NEED TO MEET YOUR GOALS?	
	How can your manager help?

Action Plan: *Complete during or after development discussion with manager*

DEVELOPMENT OPPORTUNITY	SPECIFIC ACTIONS YOU WILL TAKE	BUSINESS IMPACT/RESULTS	COMPLETION DATE

Next Steps:

Best practices indicate that you should review development plans every 3-6 months as part of Check-In.

Next Development Plan Review Date: _____