The Check-In Experience:

The Human Side of High-Quality Connections at Work

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Introduction and Key Findings

The Client Check-In Experience Study was a multi-phased, mixed-methods research project conducted by the StandOut Research Team in collaboration with seven client organizations. The purpose of this project was to get a deeper understanding of StandOut users' experiences at work as they relate to the Check-In feature and subsequent connections / conversations between team members and their leaders.

In the StandOut world, the term "Check-In" refers to a feature within the StandOut Platform — a web-based technological tool designed to assist team members in easily communicating their near-term work priorities to their leaders. In contrast, "check-in connection" is used to refer to a one-on-one conversation / exchange between a team member and their leader. While some of the results described in this research brief are based on information derived from Check-Ins submitted by users in the StandOut Platform, this project was focused primarily on the connection aspect of the overall process. Ultimately, the **Check-in and the check-in connection that follows are part of a communication process by which a team member receives attention from their leader**. As documented and reported in other research briefs, frequent high-quality attention from one's leader is one of the most powerful predictors of engagement and empirical evidence of a causal relationship between attention and engagement has been discovered.

The overarching research question this study was designed to answer is:

What do great check-ins look like, sound like, and feel like?

The short answer to this question is that they are open, honest dialogues between team leaders and their direct reports that focus primarily on near-term work priorities while remaining flexible enough to meet a variety of needs for team member participants. The long answer to this research question is represented within the findings described throughout this document and summarized at the end.

Research Design, Method, Sample

The largest portion of the results reported here are based on data collected during the Client Check-In Experience Study conducted in collaboration with seven StandOut clients. A total of 198 individual contributors participated in the initial phase of this project, which included the collection of both quantitative and qualitative data via a self-report, online questionnaire. From this sample, 40 team members participated in follow-up interviews and focus groups. StandOut data (e.g., % Fully Engaged, Engagement Pulse responses, Check-In submission and attention rates) for the 12 weeks prior to the start of the research study were incorporated into the data set to provide additional context around Check-In usage, frequency of team member-team leader connections, and experiences at work.

Most participants reported being in their current role with their current organization for 5 years or less (21% less than 1 year, 25% 1–2 years, 29% 3–5 years). While 31% of participants reported having the same static team leader for less than year, 34% reported having the same leader for 1-2 years and 26% reporting having the same leader for 3–5 years.

Twenty percent of team members identified themselves as cycle workers (i.e., "I do similar repetitive tasks each day."), 31% identified as knowledge workers (i.e., "I have a level of freedom to use my expertise to create something new."), and 50% identified as a hybrid of the two categories (i.e., "I use a level of expertise to solve similar problems each day.").

> When asked to identify the type of work they spend most of their time on, nearly half of participants (47%) identified playing to their strengths most of the time, 28% describe their work as things they love to do but have to work at to do well, and 22% describe spending most of their time at work on tasks they do not enjoy but are good at doing.

To shed more light on the importance of Check-Ins and check-in connections, this research brief also includes some results based on data collected as part of research projects for which data were collected outside of the StandOut platform. Details about those samples can be found in the documentation for the Career Growth (2024) and Power of Teammate Connection (2024) studies.

Team Leaders Set Expectations for Check-In Adoption

The number one predictor of team members' Check-In adoption (i.e., submission) is the extent to which their team leader advocates for Check-Ins. That is, team leaders who communicate to their direct reports that they value the content and process of the StandOut Check-In are significantly more likely to have teams with higher submission rates than team leaders who do not communicate a similar message to their teams. Team members who *strongly agree* with the statement *My team leader strongly encourages us to use the Check-In feature in StandOut* are more than 6× more likely to submit Check-Ins on a weekly cadence compared to team members who respond neutrally or indicate that they disagree with this statement. This effect is observed even in organizations where team members report inconsistent messaging around expectations for using StandOut. The following sentiments are excerpted from one-on-on interviews and small group focus groups with StandOut users:

> *"There's a disconnect between what the organization says and what the team leaders do. The org says that StandOut is a requirement. Team leaders may or may not require it. If my leader doesn't tell me they want me to do it, why spend my time?"*

> *"My team uses it effectively the way it was explained by HR… colleagues from other areas seem to not have the same experiences. Some people say their leaders call it optional and their leaders don't even use it, so neither do they. My leader uses it and reminds us to use it so we use it."*

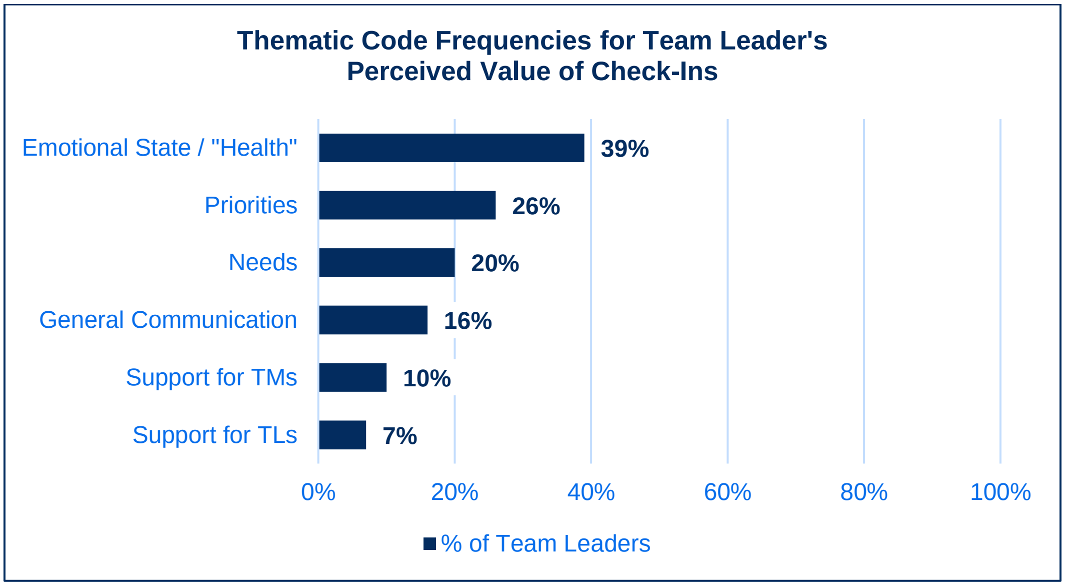
> *"Initially, it was communicated that the use of StandOut was optional yet highly encouraged by our senior leaders and the leaders I know. More recently, it has been communicated as a critical part of our communication and engagement strategy… but my leader does not ever sign in, so I don't really do it either. My friend on another team, his team leader uses it a lot, I guess, from what he says, so everyone on his team uses it, too."*

Team Leaders Value Check-Ins and Check-In Connections

Leaders of team members who report receiving frequent attention from their team leads have a lot to offer on the topic of the value that the overall check-in process provides, with six primary themes emerging from their responses to relevant open-ended questions: emotional state / health of the team, near-term work priorities, team member needs, general communication, support for team members, and support for team leaders.

> **Emotional State / "Health."** This theme (derived from responses from 39% of team leaders who participated in this study) includes all instances in which the leader referenced team member feelings, emotional states as they relate to work, and satisfaction with the work being completed (e.g., *"A chance for my direct reports to be thoughtful about his/her week and let me know what he/she feels good about."* and *"I like the loves and loathe options as a temperature check."* and *"It is informative and allows anyone the ability to write whatever they may be feeling."*).

Priorities. This theme (derived from responses from 26% of team leaders who participated in this study) includes all mentions of priorities / prioritizing work (e.g., *"Creates visibility into workload and priorities and whether those things are aligned with strengths."* and *"It helps me stay up to date on what my team is working on."*).



Needs. This theme (derived from the responses of 20% of team leaders who participated in this study) includes all instances of team leaders referring to communication from team members about their needs (e.g., *"It keeps me informed about what my team needs."* and *"It is a pulse on what is going on and what they need help with."*).

General Communication. This theme (derived from responses from 16% of team leaders who participated in this study) includes mentions of communicating with direct reports that do not fit into the other thematic categories (e.g., *"Consistent opportunity to voice concerns and other work related necessities."* and *"Learning things from my staff they may not otherwise tell me."*).

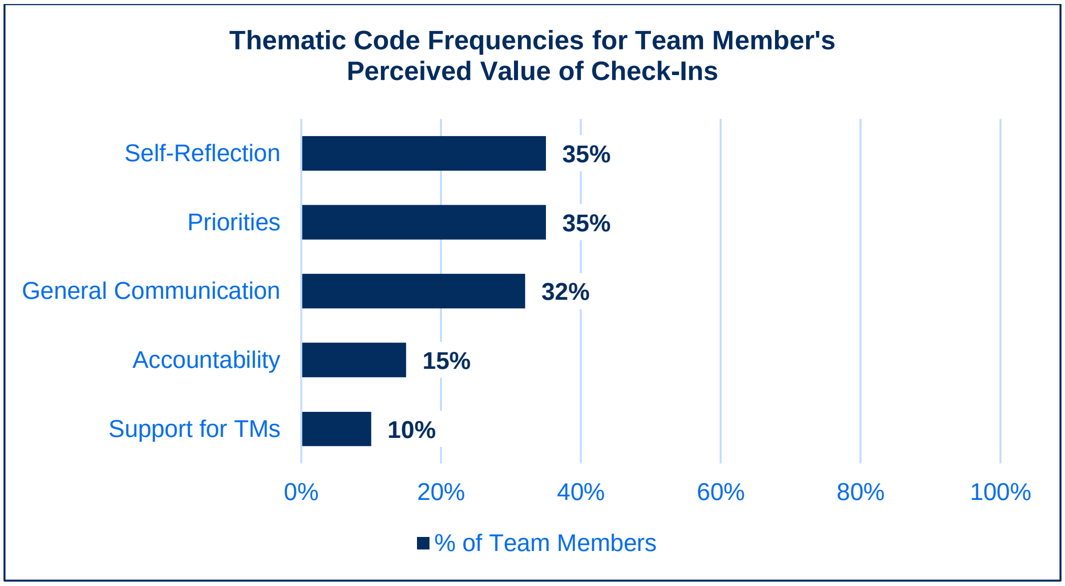
Support for Team Members. This theme (derived from responses from 10% of team leaders who participated in this study) includes all generic mentions of providing support to one's direct reports (e.g., *"It gives me a secondary opportunity to show interest in my direct reports."* and *"A chance to point out successes and fuel creativity."*).

Support for Team Leaders. This theme (derived from responses from 7% of team leaders who participated in this study) includes mentions of Coaching Intelligence and coaching tips surfaced by the StandOut Platform to support team leaders in their interactions and communications with team members as well as leveraging information from Check-Ins to facilitate positive one-on-one connection (e.g., *"Coaching Intelligence and leveraging strength roles"* and *"The loves / loathes items… typically serve as good conversation starters on topics we might otherwise not discuss."*).

Team Members Also Value Check-Ins and Check-In Connections

Individual contributors who participated in the study were asked *"What makes the check-in experience rewarding enough to you that you keep doing it?"* A cyclical inductive approach to thematic coding was applied to these responses. An inductive approach to analyzing qualitative data means that the researcher starts with the data first and identifies one or more topics associated with each data entry. Those topics are then organized and reorganized into thematic groups. As part of this process, the raw data are reviewed multiple times, as shared meanings and references do not become obvious until several data points have been considered. As each new data point is incorporated, it must be negotiated into the emerging system of codes that will ultimately be used to construct the operational definition for each theme. The process of deriving the codes from the raw data is the key characteristic of an *inductive* approach; the multiple reviews of each data point as new topics and themes begin to emerge is what makes it *cyclical* or *iterative*. This analytic approach yielded 5 distinct themes: self-reflection, priorities, general communication, accountability, and support for team members.

Self-Reflection. This theme (derived from the responses of 35% of team members who participated in this study) includes mentions of evaluating task and project progress, career growth, and identification of one's own strengths (e.g., *"Being able to see my progress on a weekly basis and reflect on the work I put in for the previous week, while analyzing opportunities to develop in my role."* and *"Checking in inspires me to consider my work week and how I am performing. In reviewing my performance and attitude toward my tasks, I evaluate my role in the organization."* and *"Seeing my progress and learning ways I can utilize my strengths and strengthen the areas that aren't as strong."*).



Priorities. This theme (derived from the responses of 35% of team members who participated in this study) includes mentions of using Check-Ins to plan for the coming week and sharing planned tasks with team leaders (e.g., *"Entering next week's tasks keeps a clear, concise list of things that need to be accomplished that our team leader and I can reference."*).

General Communication. This theme (derived from the responses of 32% of team members who participated in this study) includes mentions of communicating with one's leader that do not fit into the other thematic categories (e.g., *"It is rewarding to read my leader's comments."* and *"It's a nice way for my company's higher ups to receive an input from people they normally don't engage with."* and *"We get to voice our opinions whether good or bad, and we get to express how we are feeling each week."*).

Accountability. This theme (derived from the responses of 15% of team members who participated in this study) includes mentions of using Check-Ins to track the extent to which one accomplishes the work one intended to accomplish (e.g., *"It helps keep a record for myself and my team leader for tracking progress."* and *"It helps me… stick to my goals."*).

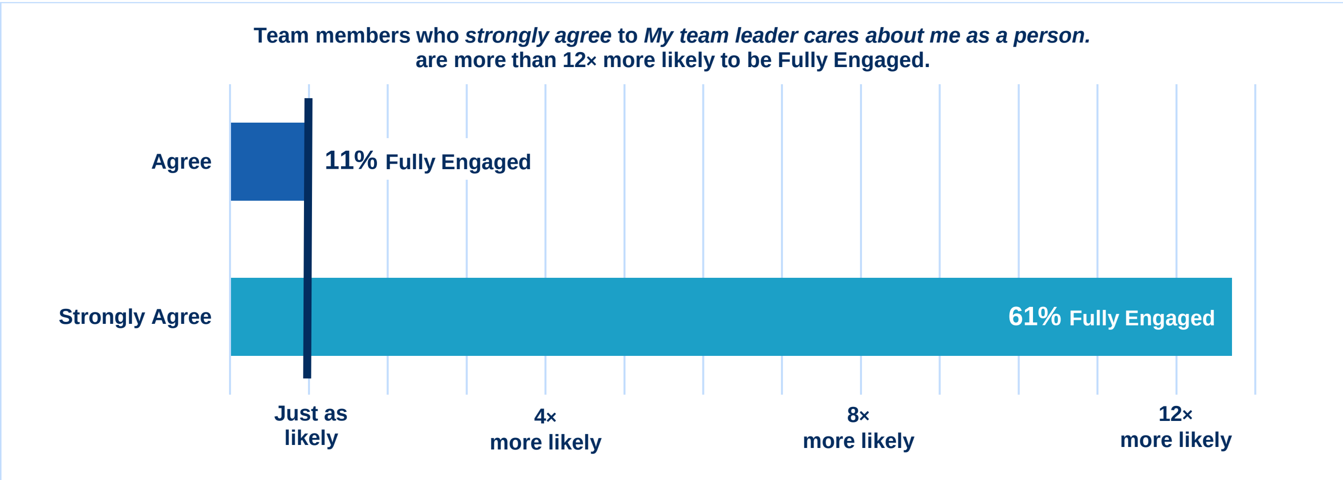
Support for Team Members. This theme (derived from the responses of 10% of team members who participated in this study) includes mentions of specific ways that team members experience their leaders using the information in their Check-Ins to support them in their work in ways other than clearing barriers or providing resources (e.g., *"Get clear instructions from my leader."* and *"Feedback and encouragement from my team leaders. It's a way that allows her to… see how I'm doing and how I'm progressing with my tasks."*). In a general population study, 31% of participants identified their team leader as their "most trusted and collaborative partner at work" and 100% of these individuals indicated that when they connect with their leaders, they always feel their leader is looking for ways to better support them in the work they are doing. Team members who *strongly agree* with the statement *I know I can go to my leader for help solving problems at work.* are more than 9× more likely to be Fully Engaged compared to team members who provide any other response.

Characteristics of Great Check-In Connection Experiences

When asked to reflect on their ideal check-in connections and the best check-in connection they've ever had, team members overwhelmingly described a common set of characteristics: personal, intentional, natural, and specific. The characteristics of great connections are the same regardless of how often they occur, how long they last, or how much effort is required to execute them. Team members also provided some context for the worst connections they had experienced — interactions during which their leader was distracted, dismissive, and distant.

Personal

Team members want check-in connections to have a personal touch — they want to know their leader sees them as whole individuals who also exist outside of work. Team members want to share what is special to them and they want to know a little bit about their leaders as well. Of course, professional boundaries should be honored, but studies repeatedly demonstrate that most team members have at least one thing from their personal lives that they enjoy sharing with their leader and teammates.



Leaders can create this space by opening up about themselves on benign topics such as pets, weekend plans, sports, family, etc. This exchange does not need to dominate the connection, but a minute or two acknowledging the humans who are interacting is time well spent. Team members who *strongly agree* that *"My team leader pares about me as a person"* are more than 12× more likely to be Fully Engaged than team members who *agree* with this item, and 24× - 76× more likely to be Fully Engaged than team members who provide a neutral response or (*strongly*) *disagree* with this statement.

Intentional

Ideal check-in connections are not tightly structured, but team members do describe them as being intentional and focused. Team members appreciate when their leaders have reviewed the information submitted via the StandOut Check-In feature prior to the meeting and show up with a list of topics to discuss or points to address. Team members want to know their leader is paying attention to the effort they put into submitting Check-Ins and are looking to their leaders to clear the path for barriers, course correct on any priorities that may be misplaced, and provide insight into the broader team / organizational effort. And guess what? Team members describe their ideal check-in connections as instances in which they also show up prepared to ask any questions they may have and discuss any topics they need addressed.

Intentional check-ins do not necessarily have to be scheduled — some team members appreciate knowing when they will connect with their leader each week while other team members enjoy the flexibility of connecting on a more organic timeline each week. Whether scheduled or not, no team member described their ideal check-in connection as taking a lot of time. In fact, the ideal length of this interaction is 20 minutes or less. Team members appreciate leaders who do not appear rushed but who also don't feel the need to run out the clock. Ultimately, an intentional connection gives team members the impression that they are important to their leaders and that their leaders have respect for the limited time and energy of their direct reports.

Natural

Team members desire positive relationships with their leaders and teammates, and this carries over into their strong preference for check-in connections to be and feel simple, authentic, and natural. Yes, your team members want you to show up prepared for a productive meeting, but they do not want the interaction to feel forced or formal. "Professionally casual" is the phrase offered by one team member and endorsed by more than a dozen others as the ideal tone for a check-in connection. Encourage your team members to be active participants every time you connect by making sure they have time and opportunity to ask questions, express needs, and voice opinions and concerns. When there is a problem to solve, team members sincerely appreciate their leaders working in collaboration with them to imagine and implement a solution. Part of the desire for a check-in connection to be *natural* is predicated on the ability for the team member and their leader to exchange information in real time, meaning that individuals are able to approach their leaders as needed to discuss the work as it evolves and new needs arise.

Debriefing

One aspect of a connection / conversation that team members especially appreciate is the opportunity to receive private recognition for a job well done. How can this aspect of the exchange be improved most? By being specific. Team members like to hear "Great job on that project" but they would love for feedback (positive and negative) to be more specific. What about the project did I do well — was it how the project was executed, the communications, getting it done ahead of schedule? Team members strive to do well and want to repeat their best performances, but feel their progress in this regard is stunted when feedback lacks the specificity necessary for them to repeat and extend the effort. Team members also report that receiving information about what they could have done differently (or better) in this context is less stressful than hearing the same information during a "performance review" or "performance conversation." When shared in the context of debriefing on completed and ongoing projects, feedback (even when it is critical) conveys the message that the team leader is invested in the performance, professional growth, and future of the team members. This allows the team member to course-correct while the action is fresh and not feel blinded by the new information months later. Not only does this serve the team member who wishes to do well, but it also builds trust between a team leader and direct reports.

Varying Content

Both team members and team leaders feel that listing Check-In priorities and the connections / conversations that follow can feel boring, redundant, and even like a waste of time. Team members told our researchers that while their first priority when they connect with their leader is to level set on those near-term work priorities, those aren't the only things they like to discuss during these connections. Team members appreciate leaders who make connection conversations a safe space in which to discuss career goals, share opportunities for growth, brainstorm on the future of the work or how the team member's strengths might be differently leveraged, and (yes) even have honest conversations that might fall into the traditional "performance feedback" category. Team members view the time they spend connecting with their leaders as opportunities for attention focused on myriad topics and highly appreciate it when their leaders seize the opportunities.

Summary of Key Findings

This study allowed us to answer our overarching research question, *What do good check-ins look like, sound like, and feel like?* The short answer to this question is that they are open, honest dialogues between team leaders and their direct reports that focus primarily on near-term work priorities while remaining flexible enough to meet a variety of needs for team member participants. In more detail:

- Team members are committed to submitting Check-Ins when they believe that doing so is a good use of their time because their team leader has communicated that they value and use the information team members share in this format.
- Team leaders who actively view Check-Ins and then connect with their direct reports value the process and describe it as helping them to stay aware of their team's "health," priorities, and needs. Team leaders view Check-Ins as a way that their team members support them, which better enables them to support their team members.
- Team members who actively submit Check-Ins and then receive attention from (or, connect with) their leader value the process and describe it as encouraging them to reflect on their own work for the purpose of growth, prioritize and plan for upcoming work, receive the support they need from their leader, hold themselves accountable in a way that allows their leader to also track their progress, and receive general communication about all topics relevant to their work experience.
- Great connection experiences vary across people but have the following characteristics in common: they are personal, intentional, natural, vary in content and focus, and serve as opportunities to debrief on work, align on priorities, partner and collaborate when needed, and build trust between team members and leaders.