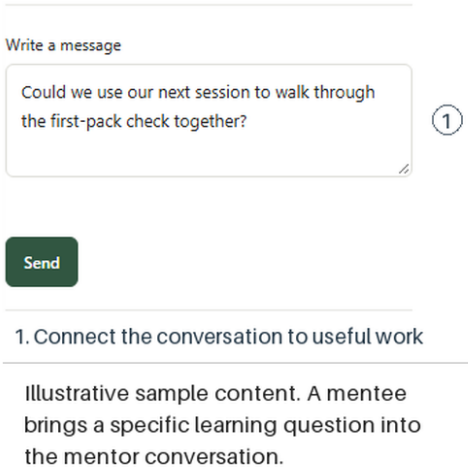
HOLD A REGULAR CHECK-IN

Give employee check-ins a useful starting point

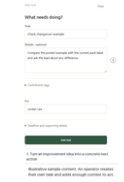
Bring progress, blockers, wellbeing, goal updates and requests into the check-in so the employee can show where a lead's response would help.

Member's check-in > Lead responds and records actions > Act on a blocker (when triggered)

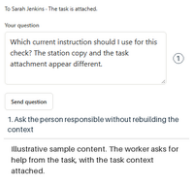
SkillSmith · Bring a practical question into the mentoring conversation



SkillSmith · Turn an improvement idea into a concrete next task



SkillSmith · Ask for help with the task attached



Bring a practical question into the mentoring conversation

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Assigned team member	Member's check-in	Respond with blockers, goal progress, wellbeing 1-5 and what i need.
Team lead	Lead responds and records actions; Act on a blocker	Respond with action done, actions, next date and notes.

Clarify the blocker with its context in view

In a worked example, the employee signals a blocker but the detail is unclear; retain the check-in and clarify the issue before deciding the next action.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Check in	Open the selected material for this occurrence.
Recorded response	what went well, blockers and wellbeing 1-5	Save the response with its work context.
Review point	goal progress and what I need	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Hold a regular check-in

Bring check in into the prepared work. Assigned team member and Team lead each receive the context needed for their part.

01 Member's check-in

Record what went well, blockers, wellbeing 1-5, goal progress and what I need.

02 Lead responds and records actions

Record notes, actions and next date.

03 Act on a blocker

When a blocker needs action outside the pair, record action done.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Hold a regular check-in

Every person tells their lead, on a rhythm, what went well, what is blocking them and how they are doing; the lead answers and acts - the smallest unit of 'someone cares'.

Monthly check-in · Assembly

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Check in The task uses this material	The check-in form.
Guidance The task uses this material	The check-in guide for leads.
Report template The task uses this material	Team check-in coverage.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose check in from the resources your team uses.

02 Agree the responsibilities

Confirm assigned team member and team lead for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Walk through these conditional steps: “Act on a blocker”.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains what went well, blockers, wellbeing 1-5, goal progress and what i need. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring check in. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do the conditional steps become part of the method?

The conditional route is used when a blocker needs action outside the pair. Select the variant or respond to the recorded condition before treating that step as required.

What is the outcome for the wider workflow?

Lead response recorded; blockers handed off.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The person has to leave the work to find its instructions or help.	Open the selected resources with the task, and keep a question attached when help is needed.
The current status hides which response or version came before it.	Keep what went well, blockers and wellbeing 1-5 with the work, with recorded history available for later review.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- What progress, concern or request should the lead respond to?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact