Check-In:
Setting the Right Context

By Fred Kofman

Too often we start a meeting and don't realize that two-thirds of those present have no idea why they're there. Of course, there's no time to explain, we're too busy with the agenda. At the end of the meeting we assume that everyone understood the issues and committed to the decisions. But there is no follow-through. It's a disaster. And we're shocked because we thought that the meeting had been great. In fact, we always think that the fewer questions, the better. If there aren't any questions, we think that everyone agrees.

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Managers spend much of their time in meetings. Their professional effectiveness, thus, depends on the effectiveness of those meetings. Unfortunately, meeting productivity oscillates between bad and terrible—and many of them are as much fun as a root canal. Most participants report high levels of frustration. One of the key reasons for the poor results of these meetings is that oftentimes, participants do not really know what the purpose of the meeting is, and why the meeting is relevant to them. Another reason is that some participants are distracted by "unrelated" issues and can't focus on the task. Without goal alignment, it is impossible to have frank discussions and resolve problems. Without engagement, it is impossible to get the job done, create mutual support and have everybody feel aligned with their values.

At the end of many meetings, many things remain unsaid. These things fester and produce a feeling of disconnection and lack of honesty. Although the meeting closed, the issues stay open, hanging in the air. Furthermore, people don't know how to proceed. It is unclear who committed to do what and when. All of this adds to the participants' stress and makes them loathe the idea of having to attend yet another meeting. Over time, it becomes extremely difficult to coordinate actions and work as a team, since nobody wants to waste their time in "useless meetings."

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The processes of *check-in* (introduction) and *check-out* (closing) increase meeting productivity. By establishing a shared context that includes the goals of the meeting and relevant contextual information, these processes help create a productive environment. Additionally, by opening and closing meetings with respectful listening, everybody has the opportunity to speak their truth and hear other people's truths.

Check-in

The check-in focuses on three questions:

1. What is my purpose in this meeting? Why is it relevant to our team/organization?
2. What concrete outcome do I want to achieve by the end of the meeting? Why is this outcome important to me/us?
3. Do I have any significant context information to share?

The first question refers to the reason for the meeting. Every action, such as "having a meeting", arises from the difference between what we think will happen if things "follow their natural course" and what we want to have happen. The importance of the meeting derives from its power to influence the situation that the people having the meeting want to change. For example, my colleagues and I want to coordinate the global launch of a new Internet service. We believe that unless we establish a shared timeline with regular checkpoints we will not be able to launch simultaneously, so we set up a series of meetings to coordinate our work.

The second question refers to the specific outcomes that each participant aspires to attain in the meeting. These outcomes are the concrete way in which each participant believes they can satisfy their needs. Unless everybody commits to produce these outcomes, it is unlikely that the group will achieve them. Just as an airline pilot makes sure all her passengers got on the right plane by announcing, “This is flight number 215 going to New York,” the person in charge of a meeting shouldn’t “take off” before agreeing with everyone that they have the same (or at least compatible) destination(s).

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The third question refers to factors that might be influencing the logistics of the meeting or the state of mind of the participants. For instance, if people learn that someone spent all night taking care of a sick child, they will interpret her yawns to mean “she’s tired but committed to being in the meeting” rather than “she’s bored and uncommitted.” Everyone needs to “make sense” of what others say or do. We “make” meaning through inferences about others’ intentions and situations. The more information we have to make these inferences, the better we can interpret other people’s actions.

The group (or the leader) must define how much time to spend on the check-in. A person can do his check-in in 30 seconds (appropriate perhaps for a 30-minute meeting) or in 5 minutes (appropriate perhaps for a daylong meeting). Whatever the time each person has, it is always better to set a time-boundary for each person before starting the round. Otherwise, a check-in might take up more time than is convenient--nobody wants to interrupt, but as time slips away people get increasingly anxious.

Physically, it is best to arrange participants in a circle or semicircle around a table so each person can see each other person. Conversations are much more effective when speakers can interact face-to-face.

The only necessary object for check-in is something easy to handle, like a stone, cup or pen, to serve as a “microphone” or talking object. This object represents the right to express oneself without interruptions. The idea is for one person to speak at a time, without others interjecting. The rule is simple: if you don’t have the microphone, be quiet and pay full attention to the speaker.

Before starting the round, it is best to give participants a few moments to contemplate the three questions freshly. In silence, perhaps making a few notes, each person can reflect on his situation and his objectives for the meeting. This is check-in with oneself allows people to find their center before they share their thoughts with others.

Next, a participant (the first speaker) volunteers to start the round. She takes the object and answers the three questions while the others listen attentively without interrupting. When the speaker finishes, she gives the object to the next participant (to her left or right).

The next speaker responds to the three questions without commenting on what previous speakers said. The check-in is different from a dialogue in that every participant presents his or her own perspective rather than elaborating on other people’s perspectives. If someone wants to reply to a certain issue, she can do it at the end of the round.

The process continues until everyone has had a chance to speak. At this point, a short unstructured dialogue might ensue, allowing participants to reflect on others’ comments. This is the time to agree on purposes and goals, ensuring that everyone is on the same page.

Benefits of the check-in

The check-in supports task effectiveness, through alignment, cooperation, mutual respect and the inclusion of diverse perspectives.

- The check-in allows each participant to become more conscious. Although people might be physically in the room, their minds may be in another time (remembering the past, planning the future) or another place (at another meeting, at home). The check-in helps focus attention and minimizes distractions.
- The check-in adds contextual depth to the meeting. Any text acquires its meaning in relation to its context; without information about the context, one needs to somehow infer or invent it to make sense of the text. It is far easier to understand the interests and objectives of others if we know their circumstances.
- The check-in allows people to express their truth and feel heard. This makes relationships more authentic. Participants “deepen” their communication by presenting a fuller picture of their situation. This fosters mutual understanding.
- The check-in promotes active listening and self-reflection. As people need not worry about replying, they can relax and give their undivided attention. Instead of thinking about what to say, they can simply listen. At the same time, they can explore their own reactions to what other people say.

- In the check-in, participants can state their intentions and concerns about the meeting explicitly. Once these intentions and concerns are in the open, it is much easier to address them. For instance, in his check-in a person might express anxiety about some task he needs to finish urgently. Then, the group might discuss if he can attend only part of the meeting. Even if that proves inconvenient, the person will feel much more committed to the team and the task.

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- The check-in enables coordination of participants' goals and expectations. Frequently, there are people at the meeting who don't clearly understand its objective, or that "clearly" understand objectives that are incompatible to others' "clearly" understood objectives. Some people don't have a clue as to why they were invited and what there role is. If this surfaces during check-in, the leader can take a few moments at the beginning of the meeting to clarify.
- The check-in helps people overcome shyness. The process gives every participant the opportunity to express him or herself without interruptions, which is useful for those who feel challenged by public speaking. As a manager told us, "After the check-in, the first time you speak is actually the second. You've already broken the ice with the check-in."

Risks of the check-in

The check-in can encourage honest exchanges, increase mutual respect and coordinate goals. But a number of legitimate concerns remain. The check in can:

1. Take too long, wasting time;
2. Become overly personal and inappropriate for a work meeting;
3. Divert from the agenda by opening up unrelated issues;
4. Seem strange; it can make people uncomfortable from the start.

These are valid concerns. A good facilitator recognizes them and addresses them directly. In fact, before doing the first check-in, it is necessary to explain how the check-in works and what purpose it serves. (Or perhaps, the leader can ask people to read this short paper.) Just as the check-in prepares the context of the meeting, an initial explanation prepares the context of the check-in. This introduction to the check-in is the appropriate time to preclude concerns or respond to doubts.

1. *Waste of time*: In accounting, there is a conceptual difference between spending and investing. Both of them allocate money, but while the expense is consumed immediately, an investment becomes a lasting asset that helps production. The check-in certainly uses the resource of time, but its goal is to increase the productivity of the meeting. The time invested in it should have a high rate of return.

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2. *Too personal*: In no way does the check-in force participants to share private information or reveal "personal problems" to any member of the team. The goal is to encourage sharing *relevant* contextual information. This information is usually about the person's professional situation, interests, concerns, or aspirations. People are able to distinguish what is pertinent to the meeting (and the group) and what is not.

3. *Unrelated issues*: The purpose of the check-in is to reveal what people are already thinking. The check-in does not produce concerns foreign to the meeting; it only brings them to the surface. Many of these concerns dissolve once people acknowledge them and need no further attention. Some of these concerns might be relevant to the purpose of the meeting. When this happens, the group can discuss whether to modify the agenda to address them.

4. *The check-in is a new practice*: By definition, everything new is unusual or "strange." However, this is no reason to reject it without trying it. The key to people accepting the check-in is to introduce it clearly, helping participants understand the why and the how. If after a few tests the team concludes that the check-in is not productive, they can always return to the traditional way of starting meetings. It is a low-cost experiment.

Besides being a good way to start, the check-in can be helpful to "check the pulse" of the team in the middle of a meeting. For instance, after a heated interchange, the leader (or any other member) can propose to have a round of check-in to allow each person to express their opinion without interruptions or discussion. This calms the mood by introducing a reflective pause that allows each member to share his thoughts and feelings about the issue at hand.

Check-out

Often the “real” meeting takes place after the “official” meeting. Important issues that people don’t voice during the meeting, get air time in the hallways. This is not very productive. The check-out is a way to bring closure to the meeting inviting participants to share their conclusions within the meeting.

The check-out follows the same process as the check-in, except for the three questions. The three check-out questions are:

1. Am I satisfied with the meeting? Were my needs met? Are there any important issues that we didn’t address?
2. What commitments did I make? What commitments did I receive? (A commitment is a promise to get something done by a certain date.)
3. What is my final reflection about the meeting (regarding how effectively we worked together, how collaboratively we related to one another and how aligned I feel we were with our values)?