PROGRESS & POTENTIAL

ALIGNMENT & ACCOUNTABILITY CHECK-INS

ALIGNMENT & ACCOUNTABILITY DASHBOARD

Employee Name	**Employee Title**
Department	**Check-In Date**
Leader Name	**Leader Title**

QUICK WINS & RAVING FANS

Top 2 Achievements This Quarter:

Praise From Patients & Peers:

CORE VALUE ALIGNMENT

Living the Values (*overall, how well values are demonstrated*) **1 2 3 4 5 6 7 8 9 10**

Example(s) of Core Values In Action (*where behaviors or attitudes align with values*)**:**

Gap(s) in Value Alignment (*where behaviors or attitudes don't reflect values*)**:**

ROLE ALIGNMENT

OBJECTIVE	CURRENT PERFORMANCE	OBJECTIVE	CURRENT PERFORMANCE
Communicates Effectively		Patient Relations	
Prioritizes Teamwork		Knowledge & Skills	
Takes Initiative		Job Description Alignment	
Decision-Making Ability		Punctuality & Attendance	
Coachability & Adaptability		Overall Work Quality	

5 - EXCEEDS EXPECTATIONS | 4 - MEETS EXPECTATIONS | 3 - REQUIRES COACHING | 2 - REQUIRES RETRAINING | 1 - BELOW ACCEPTABLE STANDARD

KEY PERFORMANCE INDICATORS (KPIS)	METRIC	EXPECTATION	DEMONSTRATED

Notes:

GOALS & COMMITMENTS

Goals Employee Will Aim to Accomplish in the Next 90 Days:

Tools & Resources Practice Will Provide to Assist Employee:

Employee Signature ______________________________________ *Leader Signature*
____

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ALIGNMENT & ACCOUNTABILITY PRE-CHECK WORKSHEET

Employee Name	**Employee Title**
Department	**Scheduled Check-In Date**

Your upcoming Alignment & Accountability Check-In is coming up! This meeting is designed to be a focused, forward-looking conversation about your growth, goals, and overall alignment with your role and our practice values. This worksheet will help you reflect on your recent accomplishments, identify development priorities, and share ideas that support your success and our team's culture. Please complete it thoughtfully and bring it to your meeting so we can make the most of our time together.

1. Share Your Wins! Name your Top 3 accomplishments since our last check-in:

2. List any professional development activities not scheduled by the practice that you've participated in recently:

3. On a scale of 1 – 10 (with 1 being the lowest and 10 being the highest):

How well do you feel your strengths are utilized in your current role? 1 2 3 4 5 6 7 8 9 10

How well do you feel you demonstrate our Core Values? 1 2 3 4 5 6 7 8 9 10

4. Think of the most significant achievement or ultimate goal you feel would take you to the next level professionally.

Identify your ultimate professional goal:

How would earning this achievement align with your current role and the Practice's mission?

Name one step you could take in the next 90 days toward reaching this goal:

Share one thing you feel may be holding you back from reaching this goal:

5. How can we – as a team and a practice – be even better?

Name one thing our team does well:

Name one thing our leadership does well:

If you could change anything about the practice or your role here, what would it be?

What should we stop, start, or continue doing to make this practice a place you'd never want to leave?

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NOTES FOR PRACTICE LEADERS

This Alignment & Accountability Check-In Packet includes two parts, designed to make these check-ins efficient and meaningful:

1. **Pre-Check Worksheet (Employee):** Given to the team member a week before the meeting to complete as self-reflection.
2. **Dashboard (Leader):** Used by the supervisor to guide the 10– to 15 -minute check-in conversation.

Purpose

This process helps leaders and team members:

- Stay aligned with the practice's mission, values, and goals.
- Keep role expectations clear and connected to measurable performance.
- Maintain a consistent record of progress and feedback.
- Strengthen the mutual feedback loop between leaders and team members.
- Build a practice where people want to stay and grow - a true "practice worth working for."

How to Prepare

- Provide team members with the **Pre-Check Worksheet** at least one week before the meeting.
- Complete most sections of your **Dashboard** ahead of time - leave the "Goals & Commitments" to finalize together.

How to Lead the Conversation

1. **Start with Recognition.** Highlight two recent wins or positive contributions. Add peer or patient praise where relevant. *(If you can't identify any positives from the last 90 days, that's a signal to dig deeper into role fit.)*
2. **Discuss Role Alignment.** Review how the team member's work aligns with their job description and KPIs. Note where they excel and where they need coaching or clarity.
3. **Review Core Value Alignment.** Identify examples where they've lived your core values and where gaps exist. *(If you haven't defined core values, now's the time to do it.)*
4. **Set Goals and Commitments.** Confirm the employee's 90-day professional goal and establish what you will provide (training, resources, time, tools). Both parties should leave with clear, written commitments.
5. **Invite and Receive Feedback.** Ask for feedback on your leadership and the practice. If feedback is difficult to hear - pause, breathe, and stay curious. Manage your reaction. Defensiveness shuts down future honesty.

Culture & Coaching Notes

- **Psychological safety is key.** Team members may hesitate to share openly due to past experiences providing or receiving feedback. Your calm, professional response can help build trust.
- **Feedback only works if it leads to action.** When leaders make visible improvements based on feedback, engagement rises.
- **This is not a performance review.** It's an ongoing, two-way dialogue that builds accountability and growth - for both sides.
- **Frequency matters.** Quarterly check-ins are ideal; semiannual is acceptable. What matters most is consistency.

Bottom Line

Alignment & Accountability Check-Ins are about continuous improvement and shared responsibility. They're designed to reinforce culture, clarify expectations, recognize achievements, and keep great team members engaged and growing. When you act on the feedback you receive and demonstrate your own commitment to growth, you model the culture you want to *create.*

Questions or HR needs? Contact **Kara Kelley, SPHR, SHRM-SCP** at **kara@clinicalhr.com** or visit **www.clinicalhr.com**.