

Three-Month Review **MAKE A COPY**

Date: _____

Completed by: _____

Other person in the working relationship: _____

This form should be completed by both Kate and Lyndy before the review meeting.

1. Wins

- What has gone well over the past three months?
 - What work has felt most satisfying or motivating?
-

2. Challenges

- What has felt difficult, unclear, or slower than expected?
 - What would make the work easier or more effective?
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3. Collaboration

- What has helped our communication and collaboration work well?
 - What could improve about how we work together?
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4. Looking Ahead

- What would success look like over the next three months?

- What support, clarity, or resources would help most?
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5. Next Steps

What action items should we focus on next?

- 1.
- 2.
- 3.

Next check-in date:
