



Working Style Preferences Check-in

Manager's Name
Direct Report's Name
Working Style Preferences Check-in
Month DD, YYYY

Goals:

- Reflect on how you manage up or down and learn how to understand your manager or direct report and their context
- Assess yourself and your needs

Question	Direct Report's Response	Manager's Response
What is your preferred communication style? (email, phone, Slack, in-person meeting, etc.)		
How are our 1:1 meetings going (cadence, structure, timing, etc.)? What is one thing we can do to improve?		
What are your working hours? What, if anything, has shifted in your availability?		
How do you prefer to give feedback? Receive feedback?		
What are your preferred systems and tools for work?		
Are you a listener or a reader? "Listeners" prefer to be briefed in person so they can ask questions. "Readers" want to process written information first, and then meet to discuss.		

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Manager-specific Questions

Note: Your manager might respond overall or respond connected to specific projects.

Question	Manager's Response
In decision-making, where do you want to be consulted, informed or a collaborator?	
Where (if at all) can I support by being more directive?	
Where should I pause and share more rationale?	
Anything else?	

Commitments

Based on our conversation, what do we want to commit to?

	Time Period	Specific Actions	Expected Results/Benefits	Date of check-in to assess progress toward commitments
Commitment #1:				
Commitment #2:				
Commitment #3:				

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