

The Supervisor's Meeting Prep Checklist for Success

Directions: Check all the boxes that apply as either "yes" or "no". In cases of "no" where applicable, identify action steps you can take to close the gap between "yes" and "no" in each area.

DO I HAVE CLEAR UNDERSTANDING ON MY ROLE AS A SUPERVISOR OR MANAGER?	YES	NO	WHAT MUST BE DONE TO CLOSE THE GAP?
Are my roles and responsibilities clear?			
Are the roles and responsibilities of my subordinates and or superior clear?			
Am I clear on the purpose and goals of the meeting?			
Do I know what I want to have happen as a result of this meeting?			
Do I know who needs to attend this meeting?			
Do I know who does not need to attend this meeting?			
Have I anticipated the responses of others attending the meeting?			
Have rehearsed how I plan to address the responses of others in the meeting?			
Have I allotted the appropriate time for this meeting?			
If there are sensitive issues to discuss, do I need to have a witness present in the meeting?			
Do I know what documentation is required for this meeting?			

Have I reviewed any policies and procedures related to this meeting?			
Do I know what the follow up to this meeting should be?			
BONUS CONSIDERATIONS FOR SUCCESS IN THE ROLE			
IS THE INTERNAL PERCEPTION OF MY SUPERVISOR ROLE CLEAR?	YES	NO	
Am I viewed as a legitimate authority by my superiors and subordinates?			
Am I clear on the relationship between the myself and my supervisor?			
Do I have clarity on who are my direct reports?			
Does any functions and duties overlap or conflict with my director's roles and lines of supervision? Am I supported by staff?			
Is there an adequate internal or external training for this role?			
CAN I MANAGE THE VARIETY AND COMPLEXITY OF THE SUPERVISOR OR MANAGER ROLE WITH SKILL?	YES	NO	
Am I flexible?			
Can I adapt to change?			
Am I a good general manager?			

Am I a good project manager?			
Am I a strategic thinker?			
Can I balance, prioritize, and delegate?			
Can I balance my ego with the role of a supervisor or manager?			
Am I passionate about making organizations work?			
Can I be empathetic?			
Do I have a strong financial background?			
Am I able to build relationships?			

1. What insights can you draw from your responses?

2. What, if anything, are you willing to address immediately based upon the insights from this checklist? _____

3. How can joining the EmPathic Institute be an effective solution in helping you become more successful in your role?
