



THE FIVE-POINT CHECK-IN

BY RICHARD HOLLOWAY

In our daily work life, practicing the five disciplines of organizational learning as defined by Peter Senge in his bestselling book, *The Fifth Discipline*, is not always foremost in our minds. We often find it easier to use the disciplines to reflect on what has happened rather than use them “in action.”

While researching the similarities between the family and the organization, I encountered the work of Virginia Satir (1916–1988), a pioneer in the field of Family Systems Therapy. In her research, Satir noticed five subjects that great performers addressed every day. From this observation, she developed this Five-Point Check-in:

- **Appreciations:** Affirmations of someone else’s good performance
- **New Information:** Something that I know, and you don’t, but you should
- **Questions:** Something that puzzles me about you or anyone or anything else around here
- **Complaint with a Request for Change:** Always presented with an openness to dialogue toward a solution
- **Wishes, Hopes, and Dreams:** Expressions of my goals, aspirations, and objectives, with which I need help to accomplish them

The Five Disciplines in Action

I find that practicing the Five-Point Check-in helps me put each of the five disciplines into action.

Personal Mastery is about exercising self-awareness and improving connections with others through reflection, inquiry, and advocacy. I have found that to genuinely express appreciation, I need to reflect on what other people’s actions or behavior have meant for the organization

and for me. The Appreciation component of the Check-in forces me to reflect on my own performance, as well as on why I did or did not appreciate a co-worker’s efforts.

Mental Models addresses the way in which we create our belief systems and opens us up to changing those beliefs by questioning them. When I ask for information about something that confuses me, I am moving from inferring to truly understanding. By sharing new information and complaints with others, I advocate for my point of view.

Shared Vision enables us to shape the organization’s future. When I share my wishes, hopes, and dreams with others, I’m contributing to that shared vision.

Team Learning relies on the successful adoption of each of the other four disciplines. Practicing team learning means constantly nurturing and cultivating the ways in which each member of the team connects. By checking in with other group members on a frequent and recurring basis, I’ve found that we are more likely to remain aligned and on track.

Systems Thinking is a holistic method of thinking about human communities and organizations. The Five-Point Check-in acts as a feedback process that generates the capacity to optimize and align individual and collective performance. By first affirming others, we connect with them through their success and open the way for more communication. Then we connect by sharing our “knowledge,” and then asking for information that may be important to us. The last two items—sharing complaints and aspirations—are connections we form toward shaping the future together.

Implementing the Check-in

How and when should people use the Five-point Check-in? I advocate using it at the beginning and end of a work cycle—that is, a day, a month, or a quarter. The real skill is in practicing the Check-in with sincerity and authenticity. It is also critical to make the time to talk with people. This

means creating a space for conversation, away from the interruption of telephones and other distractions.

Team meetings can be a good place to practice this process, with each team member contributing. The key when using it in this context is to ensure that the meeting is meaningful and

that each team member understands and skillfully practices the Check-in process, which may require some coaching. The group should also record the feedback for future reference.

Before you initiate this method as a team practice, try to develop these skills with each team member individually. When you feel that the entire team is proficient at receiving and giving feedback, then implement the Five-Point Check-in at a team meeting. It will soon become a valuable learning process that supports the daily practice of the five disciplines in the workplace. ■

Richard Holloway, now deceased, was a coach, facilitator, and change process coordinator.

YOUR THOUGHTS

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