

Assessing whether my team member is ready for a work-based learning opportunity

Manager's Development Conversation Checklist

For Job Shadowing, Secondments & Short-Term Projects

1. Understand the Employee's Motivation

- Ask what has prompted their interest in the opportunity.
- Explore what skills, experience, or exposure they hope to gain.
- Check how the opportunity supports their development goals or career path.
- Clarify what success would look like for them.

2. Assess Mindset and Readiness

- Explore their confidence and comfort with stepping into unfamiliar territory.
- Discuss their resilience and ability to manage ambiguity.
- Gauge how proactive they are likely to be in a new setting.
- Reflect together on strengths and areas for growth.

3. Review Practical Capacity

- Discuss their current workload and what might need rebalancing.
- Consider whether adjustments or support are needed.
- Confirm they have time and headspace to fully engage.
- Align on realistic timing for the opportunity.

4. Explore the Opportunity Details

- Check what the individual already knows about the host team or project.
- Clarify scope, expectations, and ways of working.
- Discuss any prerequisites or preparation required.
- Agree on how communication will work while they're away.

5. Set Clear Learning Goals

- Co-create 2–3 achievable learning objectives.
- Ensure goals are specific and measurable.
- Agree on how success and learning will be reviewed afterwards.

6. Agree on Preparation Steps

- Identify any background reading or training needed.
- Encourage them to contact the host team before starting.
- Align on a plan for capturing insights during the experience.

7. Plan for Reintegration After the Experience

- Schedule a follow-up conversation to review learning.
- Explore how new skills or insights can be applied.
- Consider opportunities to share learning with the wider team.

8. Confirm Next Steps and Responsibilities

- Summarise actions, expectations, and timelines.
- Identify any support required from you as the manager.
- Encourage them and express confidence in their development.