

# Travel Sales Colleague Check-in

Regular check-ins are one of the most powerful tools in your manager toolkit. They're simple, and make a big impact helping your team feel seen, supported, and motivated to do their best work. It's also a great moment to recognise the brilliant things they do every day. Check-ins keep everyone focused, aligned, and moving forward with energy. When you create space for honest, two-way conversations, you build a culture where people feel they truly belong. You've got everything you need right here to make check-ins meaningful and lead with confidence.

Use the framework to:

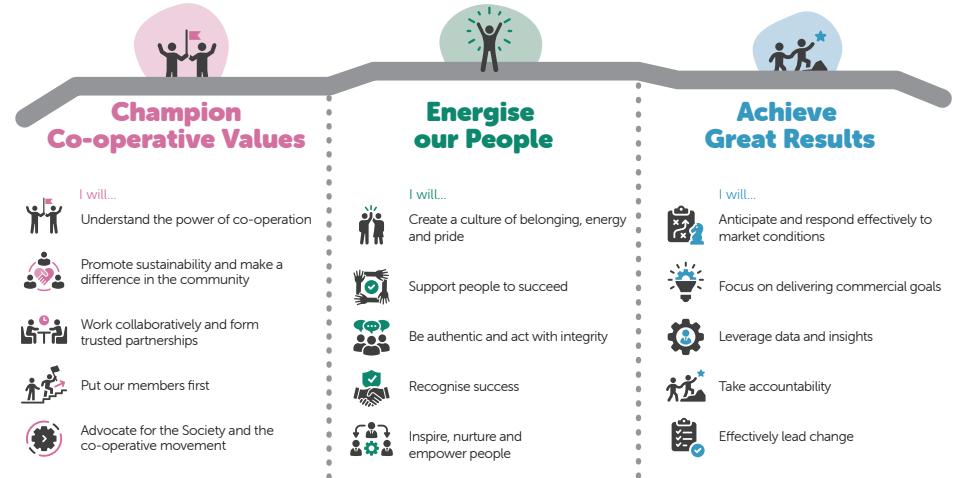
1. Set clear, meaningful goals
2. Discuss standards and expectations
3. Support ongoing development and growth

## Our Co-operative Colleague Framework



Through the power of co-operation, we're building a fairer more sustainable, and ethical future.

## Our Co-operative Leaders Framework



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# Manager Feedback Preparation

Use this guidance to get ready for a focused check-in and feedback session with your colleague. Take a moment to review a few of their enquiries and observe how they interact with customers. Then, use the areas below to shape a meaningful and supportive conversation.

## 1. Membership Conversion & FAME Journey

- Is the colleague achieving their membership conversion target?
- Is the colleague following and implementing all 6 stages of FAME?
- Which part of the customer journey does the colleague need to focus on and what actions can be taken to ensure the colleague is a fabulous agent making everlasting memories?
- Do booking notes reflect meaningful FAME conversations?
- What have you observed during customer journey observations?

## 2. KPI Awareness & Performance

- What areas has the colleague excelled in?
- What areas does the colleague need to focus on and why?

## 3. Compliance & Booking Standards

- Are enquiry and booking standards being met as set out in the enquiry and booking minimums standard policy?
- Is the file check document being used and are they compliant?
- Have there been any write-offs and actions taken?

## 4. Email Capture

- Is the GDPR script being followed?
- Are benefits of email communication being explained?

## 5. Co-op Holidays

- Has the colleague achieved the 1 in 10 conversion target?
- What support or changes could help improve this going forward?

## 6. Talk To Us Survey

- What are the colleague's CSAT and NPS scores vs site averages?
- How many WOWs have they received?
- What areas need focus based on survey results?

## 7. Compliance Training

- Has the colleague completed all quarterly compliance training?

## 8. Social Media / Customer & Member Engagement

- Has the colleague supported in the content and creation of Social Media posts?
- Has the colleague supported in generating new members and customers?

## 9. Pulse Survey

- What key themes or concerns have emerged from the latest Pulse survey results for your site or region, and how have they been addressed so far?
- Are you ready to explain the actions taken in response to feedback, and invite suggestions from colleagues in a way that feels inclusive and solution-focused?

Select up to **4 priority** areas to discuss based on performance insights, recent observations, or identified development needs.

## Conversation Starters

These conversation starters are here to help you spark meaningful chats, ones that support your colleagues, bring out their best, and show genuine appreciation for all they do. They're not a script, just a flexible guide to help you shape the conversation. Touch on each stage of the check-in, and adapt your approach to the colleague you're talking to. Keep it relaxed, supportive, and focused on moving forward.

### 1. Wellbeing — How are you?

- How have you been feeling lately, both at work and outside of it?
- What's been going well for you recently – any wins or highlights you'd like to share?
- Is there anything on your mind that could impact your wellbeing or focus?
- What support could help you feel your best right now? Are you aware of what's available like Grocery Aid or Mental Health Champions?
- How are you managing your current workload, and are there any strategies or support that could help improve it?

### 3. Manager feedback - How are we doing against your goals?

- Here's what I've observed about your performance – what's working well and where I see opportunities to grow. What are your thoughts on that?
- Let's review your goals - what progress have you made on your goals?
- What specific actions will you take to build on your strengths and address any challenges?
- What outcome will you aim for, and how will you measure your progress?
- What's one action you can take to improve membership conversion and enhance the customer experience?

### 5. Wrap Up - What's Worth Highlighting Right Now?

- Share key updates from managers meetings, The Society & Travel communications, colleague council etc.
- Celebrate progress and acknowledge the effort that's driving success
- Confirm next steps and agreed actions to keep momentum going
- Remind colleague to book a check-in or development chat anytime
- Thank colleague for their remarkable service and openness

### 2. Performance — How's your work going?

- What have you done recently that you're proud of, and what's going well in your day-to-day work?
- Are there any challenges or barriers affecting how you work – and if you could remove just one, what would it be?
- Which KPI are you most focused on right now, and how's that going for you?
- How will you continue to achieve the Coop Holidays conversion target or what will you do differently?
- What have you learned from recent training, and how has it influenced or changed the way you work?
- Where in the framework do you feel most confident, and what's one area you'd like to develop further?

### 4. Moving Forward — What's next?

- What are your top priorities over the next few weeks?
- What support, training, or tools would help you feel more confident and equipped – and how can I best support you to succeed?
- How can you support with social media and generating new customers and members?
- Here are some actions we've taken or are planning based on recent pulse feedback—do you think these are heading in the right direction? and is there anything specific you think could further improve things at our site or across the region?
- What learning or development opportunities would support your future career goals?

## Colleague Goals

Use this space to capture what your colleague's working towards right now. Make sure each goal follows the SMART approach so it's clear, doable, and trackable.

That means:

**Specific** – What exactly are they aiming to do? What's the plan?

**Measurable** – How will you know when it's done? What info or results will show progress?

**Achievable** – Can they realistically pull this off? Do they have the tools and skills they need?

**Relevant** – Does this goal make sense for the team, Trading group and the Society? Why does it matter?

**Time-bound** – When's the deadline? What's the timeframe for getting it done?

<b>Goal Description</b> What exactly are they trying to achieve? Be specific and action-focused.	<b>How we'll measure it</b> What information or results will show progress? Think numbers, milestones, or outcomes.	<b>Deadline &amp; Relevance</b> When should it be done, and why does it matter to the team, trading group or the Society?

## Conversation Summary

Summarise the main takeaways touch on how they're feeling (wellbeing), how things are going (performance), any feedback shared, development opportunities, what their most focused on at the moment (priorities) and any agreed next steps (actions).

### NOTES