

The People-First Leader Checklist

Build a stronger team, one person at a time.

Five habits to start, a simple way to track them, and a team check that shows whether anything actually changed, for first-line managers and the leaders who lead them.

70%

of the difference in team engagement comes down to the manager.

46%

of U.S. employees clearly know what's expected of them at work.

42%

of people who quit say their manager or company could have prevented it.

80%

of people who got meaningful feedback in the past week are fully engaged.

How the 90-day cycle works

Day 0

Run the anonymous team check. Score yourself first. Record your starting numbers.

Days 1–30

Run the Core 5 only. Finish a stay interview with every person.

Days 31–60

Add 2 habits from the library aimed at your lowest team-check score.

Days 61–90

Keep going. Add 2 more if the first ones are sticking.

Day 90

Re-run the team check. Compare. Keep what worked. Start again.

What's in the kit

Start Here (p. 2): the Core 5 habits, your week-one setup, and boundaries.

Team Roster (p. 4): stay interviews, leave risk, growth talks, and recognition for up to 12 people.

Habit Library (pp. 6–10): the full checklist by rhythm, moments that matter, and leading leaders.

Habit Tracker (p. 3): 13 weeks on one page, plus which habits fix which scores.

Team Check & Scorecard (p. 5): 9 questions and 10 measures to prove results.

Spreadsheet tracker: the same roster, tracker, team check, and scorecard. It does the math for you.

Eight principles behind every habit

People first, results through people.

People choose how much of themselves to bring. Earn that choice.

Clarity is kindness.

Say what matters, and what doesn't.

Care and candor go together.

Tell the truth and hold a high bar: kindly, directly, early.

Grow people, not just output.

People stay where they are getting better.

Trust is built in small moments.

Not in offsites. In how you react to a mistake on a Tuesday afternoon.

Safety makes candor possible.

People raise risks only when it's safe to.

Give ownership, not just tasks.

Trust people with the problem and the decision.

You set the ceiling.

A team rarely rises above its leader. Work on yourself first.

Start Here: The Core 5

Your first 30 days · about 1 hour a week plus 1:1s

Do these five and nothing else for the first month. They cover the strongest drivers in the research: connection, clarity, recognition, safety, and retention. Everything else in this kit builds on them.

1

Hold a weekly 1:1 with every direct report

15–30 minutes. Their agenda first. Cover recent wins, working relationships, current priorities, and their strengths.

"What's getting in your way?" · "What should I start or stop doing?"

Time: ~30 min per person / week

Done when: Every person had a 1:1 this week. Never cancelled, only moved within the week.

2

Restate the top 3 priorities every week

In your team meeting or a short written note. Name the top 3, and name one thing that is explicitly not a priority right now.

"If you only get three things done this week, make it these. And we're pausing ____."

Time: ~10 min / week

Done when: Anyone on the team can name the top 3 without looking.

3

Recognize one person specifically every week

Say what they did, why it mattered, and who it helped. Do it soon, and in the way that person prefers (public or private).

"The way you ____ meant ____ for _____. Thank you."

Time: ~5 min / week

Done when: Logged on the roster. Nobody goes more than a month without being recognized.

4

Meet bad news with curiosity, every time

Your first reaction decides whether you hear the next problem. Thank them first, ask questions second, decide third.

"Thanks for flagging it early. What do you know so far, and what do you need from me?"

Time: Seconds, but every time

Done when: People bring you problems early, without being asked.

5

Hold a stay interview with each person (month one)

20–30 minutes, one time per person in the first 30 days, then quarterly. Write the answers on the roster and act on one thing.

"Why do you stay? What might make you leave? What would make this the best job you've had?"

Time: ~30 min per person, once

Done when: Everyone done by day 30, with one action logged per person.

Week-one setup

- ☐ Send the anonymous team check (Day 0) and fill in your own leader self-score before you see the results.
- ☐ Put recurring 1:1s on the calendar for every direct report.
- ☐ Fill in the roster: names, roles, and the date of your last real conversation with each person.
- ☐ Book stay interviews: 2–3 per week until everyone is done.
- ☐ Tell the team what you're doing and why: "I want to be a better leader for you. Here's what I'm going to try for 90 days."

Rules that make it stick

- ☐ **Calendar it, don't remember it.** Every habit gets a recurring time slot.
- ☐ **Tick it every Friday.** Five minutes on the habit tracker. Aim for 80%+.
- ☐ **Miss a week? Restart, don't quit.** Consistency beats perfection.
- ☐ **Tell one peer.** A leader who knows your plan will ask how it's going.

Boundaries: Listen, don't diagnose. If someone shares a personal, health, family, or legal issue, be kind, keep it private, and connect them with HR or your Employee Assistance Program. Your job is support and flexibility, not counseling.

90-Day Habit Tracker

Tick every Friday · aim for 80%+ on the Core 5

Put a check in the week you did the habit. Add new habits in month 2 and month 3, not before. The spreadsheet version works out your completion rate for you.

	Month 1					Month 2				Month 3				
Habit	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	
Hold a weekly 1:1 with every direct report														
Restate the top 3 priorities every week														
Recognize one person specifically every week														
Meet bad news with curiosity, every time														
Hold a stay interview with each person (month one)														
Added habit 1: _____														
Added habit 2: _____														
Added habit 3: _____														
Added habit 4: _____														
Core 5 done this week (of 5)														

If your lowest team-check score is..., add these habits

After Day 0, find your lowest-scoring area (the spreadsheet names it for you). Pick 2 habits from that row for month 2. Full details are in the Habit Library.

Clarity	Restate top 3 priorities (core) · Reset goals with each person · Translate leadership news into team context
Connection	Cover the four topics in 1:1s · Check in on the person before the work · Update your people notes
Recognition	Recognize one person in front of others · Audit recognition and assignments · Mark the milestones
Safety	Model the candor you want · Close the loops you opened · Blameless reviews when things go wrong
Workload	Check workload before asking for more · Shield the team from noise · Review sustainability
Growth	Monthly growth conversation · Hand out one stretch opportunity · Sponsor someone in a room they're not in
Ownership	Let people own the how · Delegate outcomes, not tasks
Care	Check in on the person before the work · Update your people notes · Write a personal note to each person
Staying	Quiet retention-risk scan · Advocate for pay and promotion with evidence · Co-write development plans

Team Roster

Team Roster

Leave risk: **L** = low, **M** = medium, **H** = high. Every M or H needs an action. Anyone not recognized in 30+ days goes to the top of your list. Department heads: keep one roster for your direct reports and ask each manager to keep their own.

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Team Check

Day 0 and Day 90 · anonymous · 3 minutes for the team

- 1** Copy the 9 statements into Google Forms or Microsoft Forms. Scale: 1 = strongly disagree, 5 = strongly agree.
- 2** Add the open question below. Turn off name and email collection.
- 3** Before you see results, score each statement the way you think your team will.
- 4** Paste results into the spreadsheet. Share the top-line results and one action with the team.

Area	Statement	You	Day 0	Day 90
Q1 Clarity	I'm clear on what's expected of me and what a great job looks like.			
Q2 Connection	I have a useful conversation with my manager at least every week or two.			
Q3 Recognition	My good work gets noticed and recognized.			
Q4 Safety	I can raise problems, risks, or mistakes without worrying about how I'll be treated.			
Q5 Workload	My workload is sustainable.			
Q6 Growth	I'm learning and growing in this role.			
Q7 Ownership	I have real say in how I do my work.			
Q8 Care	My manager cares about me as a person.			
Q9 Staying	I see myself still on this team a year from now.			
Open	<i>What's one thing your manager should start, stop, or keep doing?</i>			

Team average 4.2+ = strong · 3.5–4.1 = solid · below 3.5 = focus area. If your score is much higher than your team's, that's a blind spot, and the most useful thing you'll learn.

90-Day Scorecard

Three areas, ten measures · the spreadsheet calculates most of them

Measure	Day 0	Day 90	Change	Better is
Team-felt change				
Team check average (all 9 questions, 1–5)				Higher
Safety: % who agree (4 or 5) with question 4				Higher
Blind-spot gap: your self-score minus the team's average				Closer to 0
Retention & growth				
Regretted departures in the last 90 days				Lower
Stay interviews completed (% of team)				Higher
Leave-risk actions completed (% of high/medium risks)				Higher
Internal moves and stretch roles (count)				Higher
Leadership consistency				
Weekly 1:1s held (% of weeks so far)				Higher
People with a written development plan (%)				Higher
People recognized in the last 30 days (%)				Higher

Leadership consistency measures come straight from your roster and habit tracker, so they reflect what you actually did, not what you meant to do. This kit measures your own team; for handoffs, decisions, and partners across teams, use The Connector Playbook.

REFERENCE

The Habit Library

The full checklist. Don't try to do it all. Pull from here when your team check points to a gap, and add habits two at a time.

Daily

~15 minutes, woven into your day

WHY IT MATTERS Trust isn't built in big speeches. It's built in dozens of small, repeated moments where people see that you notice them and have their back.

- ☐ **Check in on the person before the work.** Greet people by name and ask one real question before asking for a status update.
- ☐ **Clear one blocker for someone else first.** Before your own task list, remove one obstacle: a decision, an approval, an intro, a resource.
- ☐ **Thank someone for something specific.** Say what they did and why it mattered. "Great job" is noise; specifics are recognition.
- ☐ **Meet bad news with curiosity, not heat.** First words: "Thanks for flagging it early. What do you need?" How you react decides whether you hear the next problem.
- ☐ **Stay reachable.** Keep an open block for quick questions, or walk the floor / open your door virtually. Make asking for help cheap.
- ☐ **Model the candor you want.** Admit one thing you don't know or got wrong. It gives everyone else permission to do the same.
- ☐ **Watch for quiet signals.** Late-night messages, silence in meetings, short replies, missed lunches. Follow up privately, not publicly.
- ☐ **Close the loops you opened.** Answer the question you said you would. Unclosed loops quietly teach people that speaking up goes nowhere.
- ☐ **Check your own state before key conversations.** Stressed, rushed, or irritated? Pause for one breath first. Your mood spreads to the whole team faster than any memo.
- ☐ **Let people own the how.** Before you jump in to fix it, ask: "What do you think we should do?" Step in only when they ask or the risk is real.
- ☐ **Take a 60-second end-of-day check.** Who did I help today? Who did I miss? Who needs me tomorrow?

Weekly

~30 min per direct report + 1 hour

WHY IT MATTERS Weekly 15–30 minute conversations beat long, rare ones. People who get meaningful feedback every week are far more engaged, yet only about 1 in 6 say their last manager conversation was truly meaningful.

- ☐ **Hold a 1:1 with every direct report (15–30 min).** Their agenda first, yours second. Never cancel. If you must move it, move it within the same week.
- ☐ **Cover the four topics that make 1:1s land.** Recent wins, working relationships, current priorities, and their strengths. Don't make it only about problems.
- ☐ **Ask one question that invites the truth.** "What's getting in your way?" · "What should I start or stop doing?" · "What would you change about how we work?"
- ☐ **Recognize at least one person in front of others.** Specific, timely, tied to impact, and in the way that person prefers (some people want the stage, some want a note).
- ☐ **Restate the top 3 priorities — and what is not a priority.** Saying what to stop is as clarifying as saying what to start.

- ☐ **Check workload before asking for more.** Who is over capacity? Rebalance or cut scope instead of quietly adding hours.
- ☐ **Run a team meeting where every voice counts.** Open with wins and lessons. Let quieter people go first (round-robin or write-then-talk). Remote teammates get the same airtime, information, and credit. End with owners and dates.
- ☐ **Delegate outcomes, not tasks.** Hand off the problem and what “done” looks like, then agree who decides what. Check progress at set points instead of hovering.
- ☐ **Follow up on missed commitments, kindly and directly.** Name the gap, ask what got in the way, agree on the fix. Caring about people means holding the bar, not lowering it. That goes for your own commitments too.
- ☐ **Shield the team from one piece of noise.** Absorb churn, politics, or a fire drill so it doesn’t land on people who need focus.
- ☐ **Update your people notes.** Goals, career hopes, what they care about outside work that they’ve chosen to share. Then actually use it.

Monthly

~2–3 hours total

WHY IT MATTERS Fewer than 1 in 3 employees say someone at work encourages their development. Monthly is where growth stops being a promise and becomes a practice.

- ☐ **Have a growth conversation, separate from status.** “Where do you want to be in 1–2 years? What skill do you want next? How can I help?”
- ☐ **Hand out one stretch opportunity.** Match it to someone’s strengths and goals. Back them up visibly if it gets rough.
- ☐ **Sponsor someone in a room they’re not in.** Put their name and their work in front of senior leaders. Give credit away; keep the blame.
- ☐ **Run a retro on how the team works together.** Not just what shipped. Keep / Stop / Start on meetings, handoffs, decisions, and communication.
- ☐ **Send a 3-question pulse.** “Do you know what’s expected? Do you feel heard? Is your workload sustainable?” Share the results and one action you’ll take.
- ☐ **Audit recognition and assignments for fairness.** Who hasn’t been recognized? Who keeps getting the high-visibility work, and who keeps getting the thankless tasks? Rotate both.
- ☐ **Share one story of impact.** Show how the team’s work helped a real customer, user, or partner team. People give more to work they can see matters.
- ☐ **Connect with someone outside your reporting line.** Coffee or a walk with someone on another team or a junior engineer. Listen more than you talk.
- ☐ **Translate leadership news into team context.** What’s changing, why, what it means for us, and what you don’t know yet. Silence gets filled with rumors.
- ☐ **Mark the milestones.** Work anniversaries, launches, certifications, and the personal moments people chose to share.

Quarterly

~half a day of 1:1 time + 2 hours

WHY IT MATTERS Clarity is what makes a team dependable, yet fewer than half of employees clearly know what's expected of them. People who use their strengths every day are far more likely to be engaged and to stay.

- ☐ **Reset goals with each person.** What does success look like, how will we measure it, and how does it connect to the team and company mission?
- ☐ **Check strengths vs. assignments.** Is each person spending most of their time on work that uses their strengths? Adjust roles where you can.
- ☐ **Hold a stay interview with each person.** "Why do you stay? What might make you leave? What would make this the best job you've ever had?"
- ☐ **Do a quiet retention-risk scan.** For each person: low / medium / high risk and one action. Don't wait for a resignation letter to start the conversation.
- ☐ **Score team health together (1-5).** Safety · Dependability · Clarity · Meaning · Impact. Pick the lowest score and fix one thing.
- ☐ **Remove one systemic friction point.** A broken handoff, a slow approval, a tool everyone hates, a meeting that should be an email.
- ☐ **Ask for upward feedback on yourself.** Make it anonymous if needed. Share what you heard and the one thing you'll change.
- ☐ **Review sustainability.** On-call load, after-hours work, PTO actually taken. Protect recovery as seriously as you protect deadlines.

Annually

~1-2 days spread across the year

WHY IT MATTERS Replacing a skilled technical employee can cost around 80% of their annual salary, and many departures were preventable. Almost half of people who quit had no conversation with a manager about their future in their last three months.

- ☐ **Co-write a development plan with each person.** Their goals, two or three skills to build, and what support you'll provide (training, mentor, project).
- ☐ **Run reviews with zero surprises.** Nothing in an annual review should be news. If it is, the weekly 1:1s weren't doing their job.
- ☐ **Advocate for pay and promotion with evidence.** Build the case early, fight for it, and tell people what you did on their behalf.
- ☐ **Plan succession, including for your own role.** Who could step up for each critical role? Start developing them now.
- ☐ **Refresh the team charter.** Values, working norms, how we disagree, how we decide, how we treat partner teams.
- ☐ **Invest in your own growth.** A 360 review, a coach or mentor, a course or book. A team rarely grows past the person leading it.
- ☐ **Write a personal note to each person.** One specific contribution they made this year and why it mattered to you.
- ☐ **Prune what no longer earns its time.** Retire one recurring meeting, report, or process. Give the time back to the team.

As It Happens: Moments That Matter

Within 24–48 hours

WHY IT MATTERS People remember how you showed up on their hardest and best days far longer than anything on a calendar.

☐ Hiring	Write a clear role before you post it. Use structured, consistent interviews. Answer every candidate quickly and respectfully; they remember how you treated them.
☐ New hire	Have everything ready before day one. Assign a buddy. Lunch in week one. Help them land a small win early. Check in at 30 / 60 / 90 days.
☐ Someone is struggling	Talk early and privately. Lead with curiosity. Separate the person from the problem. Agree on a clear plan and support.
☐ Mistake or incident	Run a blameless review. Thank whoever raised it. Fix the system, not the scapegoat.
☐ Conflict	Address it within 48 hours. Meet each person separately, then together. Focus on shared goals, not who's right.
☐ Change, reorg, or layoffs	Say what you know, what you don't, and when you'll know more. Meet 1:1 within 24 hours. Check on the people who stay.
☐ Someone resigns	Thank them. Ask for an honest exit conversation. Stay in touch; former teammates become referrals, partners, and boomerang hires.
☐ A big win	Celebrate the people, not just the result. Name contributors by name, including the ones behind the scenes.

Warning signs to watch for

- Status reports are always green
- Silence when you ask "any concerns?"
- "Fine" is the answer to everything
- People stop asking each other for help
- 1:1s keep getting cancelled
- Top performers stop volunteering ideas
- Rising sick days or after-hours messages
- Good people leave and it "came out of nowhere"

Great people build excellent companies. Lead them like it.

Leading Leaders

For department heads, directors, VPs

WHY IT MATTERS Managers drive most of the difference in team engagement, but manager engagement itself has dropped sharply in recent years, and many managers never received formal training. Your managers need the same care you ask them to give.

- ☐ **Weekly: 1:1 with each manager, starting with them.** Ask how they are doing first. Then: "Which of your people need my attention right now?"
- ☐ **Monthly: skip-levels or small-group open Q&A.** Feed the themes back to your managers. Work through them, never around them.
- ☐ **Monthly: run a manager circle.** Managers bring one real people challenge; peers coach each other. Builds skill and a support network.
- ☐ **Quarterly: coach your managers on this checklist.** Review their 1:1 cadence, stay interviews, recognition, and retention scans with them.
- ☐ **Quarterly: calibrate fairness across teams.** Compare promotions, pay, workload, and recognition across teams. Fix gaps before people notice them for you.
- ☐ **Always: protect your managers' time for people work.** If their calendars are all meetings and status reports, coaching is the first thing that disappears.
- ☐ **Always: promote and hire managers for people skills.** Technical excellence is the entry ticket, not the qualification. Train every new manager in their first 90 days.
- ☐ **Always: reward bad news traveling fast.** Publicly thank people who escalate early. The day someone hides a problem from you is the day it got expensive.
- ☐ **Always: model it.** Your managers copy what you do, not what you say. They will run 1:1s the way you run yours.

Leading across teams? This kit is about the people who report to you. For handoffs, decisions, suppliers, and partners, the work that happens *between* teams, use the companion kit: **The Connector Playbook**.