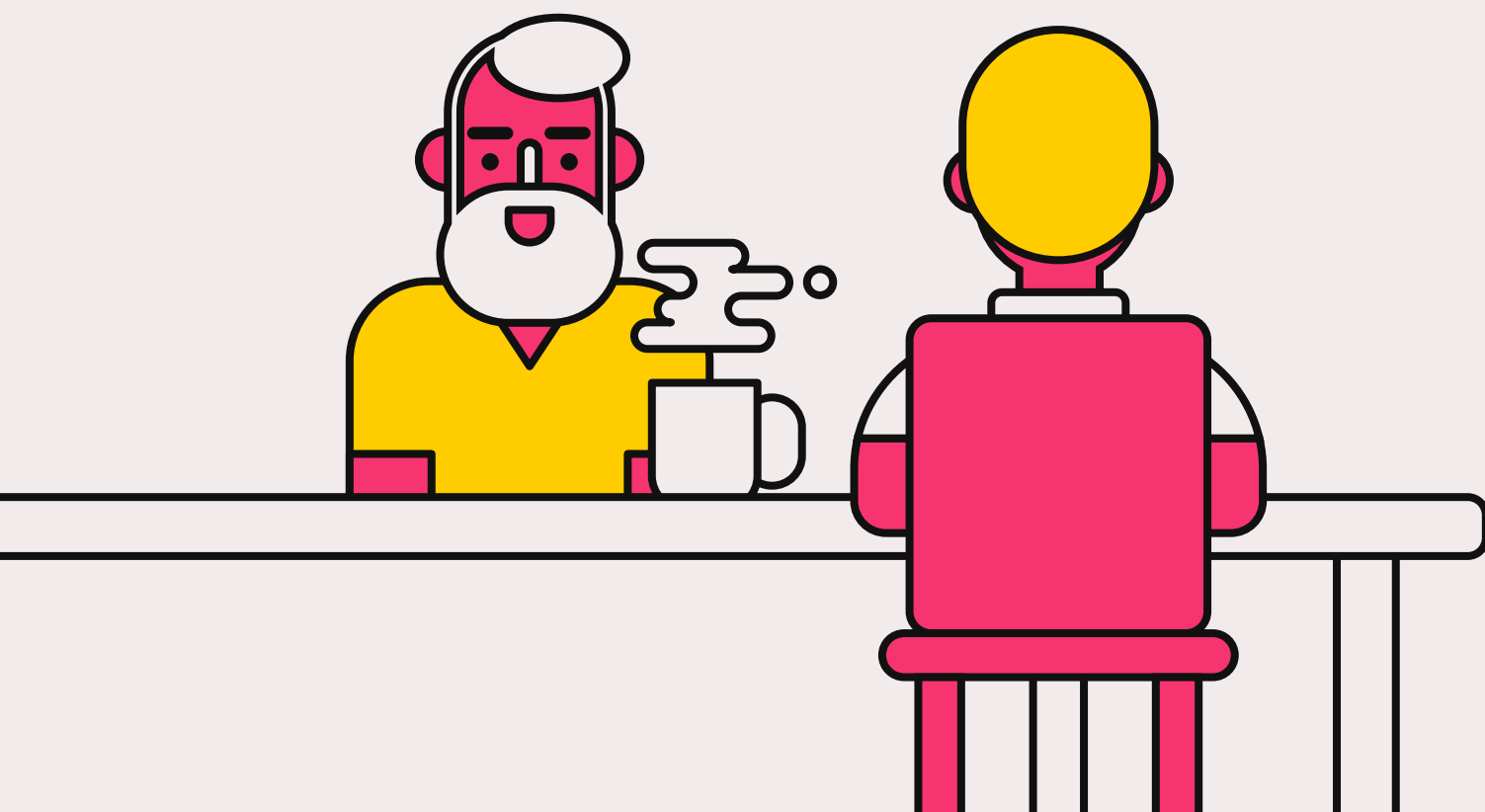
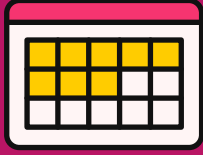


QUICK START GUIDE TO

One-on-One Best Practices





Schedule

- Weekly or bi-weekly, not monthly or daily
- Frequency depends on team size and each individual's needs
- Make them a habit; avoid cancelling (aim for 90% attendance)
- Leave gaps between one on ones for flexibility and preparation



Agenda

- 30 or 60 minutes
- Team member check-in (**5 mins**): energy, emotions, engagement
- Team member work update (**10 mins**): previous actions, project updates, critical obstacles
- Manager update (**10 mins**): performance feedback; new goals or objectives; offer support
- Flex time (**5 mins**): deeper discussion, or end early!



Content

- Focus on important, not urgent topics
- Schedule separate meetings for deeper discussions
- If something is urgent, don't wait for your one on one to discuss it



Approach

- Coaching puts power into your team member's hands to problem-solve
- Sometimes telling, directing, or advising is necessary
- Be flexible and abandon the regular agenda if necessary (e.g. support through crisis)



Location

- Private, not public, in office or cubicle (meeting room if necessary)
- Avoid interruptions and distraction; turn your phone and monitor off
- Remote meeting is ok, but use video if available versus phone



Notes

- Take handwritten notes; typing is easier, but more distracting
- Note only the most important points, actions, and decisions
- Decide when and when not (e.g. during an emotional subject) to take notes



Preparation

- Review previous meeting notes / actions / decisions
- Consider the team member's work and projects
- Determine any general performance feedback you want to deliver



PRINT ME!

One-on-One Meeting Template

Company Name

Team Member Name:	Date:
-------------------	-------

Team Member Personal Check-In: <i>(Their energy, emotional state, overall engagement)</i>

Team Member Work Update: <i>(Previous actions, project updates, obstacles)</i>	Actions / Decisions:
-----------------------------------------------------------------------------------	----------------------

Manager Update and Future: <i>(New policies, performance feedback, new goals)</i>	Actions / Decisions:
--------------------------------------------------------------------------------------	----------------------

New goals, Projects, or Responsibilities:

(Note any significant changes discussed and agreed to)

Additional Notes:

30 Minute One-on-One Meeting

Sample Questions



MINUTES

Team Member Check-In

- On a scale of 1 to 10, what's your energy level like right now?
- What one word would you use to describe how you're feeling today?
- How are things going at home?
- How was your weekend? What did you get up to?
- How is that new hobby / sport / activity of yours going?



MINUTES

Team Member Work Update

- How was your progress on the actions we discussed last meeting?
- What is top-of-mind for you right now at work?
- Where are you at with X project / Y task / Z goal?
- What obstacles or barriers to success / completion are you running into?
- Are you on track to meet your deadlines this week?
- Do you have any thoughts, ideas, or suggestions on how to solve this problem?



MINUTES

Manager Update and Future

- How can I help you or support you in completing X project / Y task / Z goal?
- Would you be willing to take on X new project?
- How will these new tasks / responsibilities impact your existing ones?
- How will the company's new policies impact you?

Sample General Coaching Questions

(From Co-Active Training Institute Toolkit)

- What is exciting to you about this?
- What do you think is best?
- How do you feel about it?
- What is the opportunity here? What is the challenge?
- What part of the situation have you not yet explored?
- What other angles can you think of?
- If you could do it over again, what would you do differently?
- What is the action plan? What will you have to do to get the job done?



Be open, be curious,
and be sincere!