

# Establishing 1-on-1s

Manager Guide

**Regular, recurring meetings are an ideal opportunity for you to foster connection, trust, and a sense of belonging with your direct report. When you get 1-on-1s right, you'll experience improved morale, productivity, performance, and engagement across your team.**

## WHY YOU'LL LOVE IT

- 1-on-1s are opportunities to strengthen your relationship, develop trust, and create a safe environment for your direct report to talk candidly about what matters to them.
- It's also opportunity for you to hone your coaching skills, your listening competencies, and your ability to give clear guidance and feedback.



## BEST PRACTICES

### Prepare in advance

- ❑ Agree on a shared agenda beforehand (ideally the day before).
- ❑ Consider any achievements that should be recognized or any feedback you might have for your direct report. Practice how to phrase your feedback.
- ❑ Avoid rescheduling the meeting at the last minute – your direct report must have a consistent meeting where they get their manager’s attention and focus

### Create the right environment

- ❑ Set the tone. Be punctual and warm from the moment you join the meeting. Remind them that this is their time and set the tone to communicate openness and safety.
- ❑ Stay present. Remove any distractions: move away from workstations and silence phones or laptops. Make your direct report feel that they’re your priority.
- ❑ Ask questions – especially open-ended questions. Stay focused on the direct report, try to avoid shifting the conversation to yourself or others unless truly necessary.
- ❑ Take shared notes of the key points and actions that you can refer back to at a later date. Seek clarity (or set out examples) where necessary to ensure understanding.

**1-ON-1 MEETING TEMPLATE**

AGENDA	CONVERSATION NOTES
<p>Confirm a shared agenda</p> <p><b><i>What's the best use of our time today?</i></b></p> <p><b><i>What's been top of mind for you this week?</i></b></p>	
<p>Ask for a follow-up on previous actions</p> <p><b><i>What progress have you made on X this week?</i></b></p>	
<p>Ask about key successes or highlights from the week. Acknowledge any of your direct report's achievements, or instances where they contributed value</p> <p><b><i>What went well or was highlighted since our last 1-on-1?</i></b></p>	
<p>Check-in on key areas like their wellbeing, growth and learning, work relationships, productivity, and impact</p> <p><b><i>How are you feeling about X?</i></b></p> <p><b><i>Which aspects of X are/aren't going well right now?</i></b></p>	
<p>Ask for feedback on your role as a manager</p> <p><b><i>What can I help you with between now and next time we meet?</i></b></p> <p><b><i>What can I do differently?</i></b></p>	
<p>Wrap up the 1-on-1</p> <p><b><i>Let's confirm what each of us will take action on.</i></b></p> <p><b><i>What do you find most helpful/least valuable about our 1-on-1s?</i></b></p>	

## Establishing 1-on-1s

### FOCUS AREAS FOR THE FIRST TWO WEEKS

#### Day 1: Share your approach for leading others and understand what your new hire values

- Use the **How You Lead / What They Value Manager Guide** to plan how you will articulate what you value as a leader and also ask what they value

#### Week 1: Set the context of a 1-on-1 and get to know one another

- Discuss the importance and benefits of 1-on-1s - this can help them understand the value and dedicate the appropriate amount of focus.
- Allow your direct report to co-create and own the purpose of the meetings. Ask them to consider how both parties could work together to make sure the direct report gets the most value out of the meeting.
- Agree on duration and frequency (suggested is weekly or bi-weekly) - the important thing is to maintain a regular frequency.
- Agree on an overall structure that still allows room to deviate if something comes up that they'd like to discuss.
- Establish where, when, and how you'll meet – i.e. Zoom, meeting room, or even going outside of the office - always ensure that the space allows for privacy and confidential conversations.

#### Week 2: Clarify expectations and assess overall experience about the first week

- Use the **Expectations Exchange Manager Guide** and the new hire's **Best-Self Alignment Exercise** notes to structure the majority of the 1-on-1 conversation
- After Week 1, your new hire will have formed a solid first impression. Use these questions to dig in and learn more:
  - What's your first impression of ...the business? ...your team? ...your role? ...others you have met?
  - How do your first impressions compare to your expectations?
  - What else can I or others provide, to help you better settle in?
  - What areas feel the most complex and/or confusing?