

The Guide to Two Designs for **ONE-ON-ONE MEETINGS**

The value of one-on-one sessions is that they can truly be a back-and-forth, give-and-take discussion that leads to transparency, clarity, and progress. **The best one-on-one meetings are led by the employee rather than the manager.**

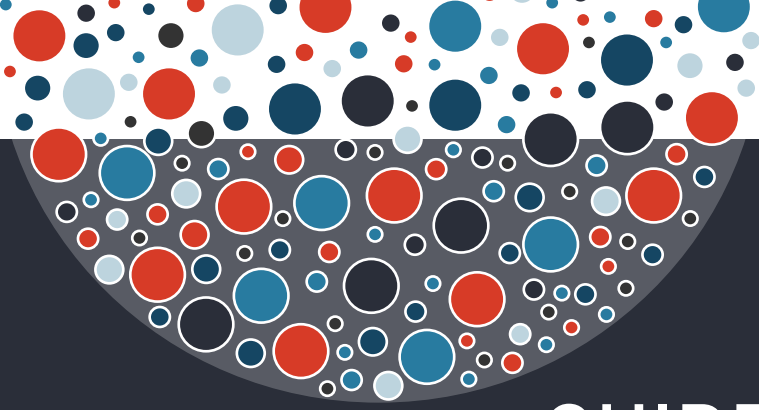
This guide covers two one-on-one meeting formats that successful companies have put into practice with wonderful results. Both are initiated, designed, and led by the staff member, not the manager. While that's not necessary, there is a powerful level of ownership gained by having the employee be responsible for the meeting.

If you are an employee, consider this.

Managers often don't have time to think about one-on-one meetings ahead of time, and they sincerely appreciate employees who come into each meeting prepared. Scheduling and preparing for your one-on-ones is a powerful way for you to come across as remarkable.

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GUIDELINES

To be truly effective, these conversations need to be “filterless.”

By that I mean both the manager and staff member agree to speak openly as well as respectfully. Here are some guidelines that you might include in your organizational culture to promote greater levels of candor and permission and to provide the context and tone for your one-on-one discussions.

Let’s be straight with one another...

- If you are ever curious or concerned about anything...ask. I’ll tell you the truth.
- If I have concerns about your performance or hear any concerns from anywhere in the organization, I’ll tell you within one week.
- If something isn’t working for you, let’s discuss it.

Let’s be accountable to one another...

- Let’s avoid unfulfilled expectations by being clear and specific when we discuss goals and action items. If it’s not clear... ask.

Let’s be fair with one another...

- Decision making will be transparent and open to input and review, yet not everyone will be involved in every decision. Ask for the level of involvement you need.
- Let’s give one another the benefit of the doubt... and when we make a mistake, let’s have it be no more than a mistake.

THE TEMPLATES

This guide includes templates for two kinds of one-on-one meeting, both initiated by the staff member.

1 Standard Checking-In

This simple approach works well for weekly or bi-weekly check-in meetings lasting 30 to 45 minutes. This template is a reasonable choice for groups getting started with one-on-ones.

2 30-60-90

These meetings are usually held once each month.

Providing clarity about the future and the focus required to achieve it are important elements of managing people. Three time frames are important—30 days, 60 days, and 90 days—so that longer-term issues get equal attention.

This format sets up excellent, purposeful discussions which add to the relationship. In addition, the manager can learn where he or she might help team members by clearing roadblocks, selling ideas, or obtaining resources.

The next few pages include simple step-by-step instructions for these two meeting formats.

A Standard Checking-In Meeting

Preparation

Action required of the employee:

- Request time on the manager's calendar.
- Share a proposed agenda two or more days in advance of the meeting.

Agenda Format

For each topic:

- State the issue or topic to be discussed.
- Provide enough background or context so issue is clear.
- **State the desired outcome** for this conversation.

During the Meeting

For each topic:

- Review recent circumstances and actions.
- Discuss ideas, concerns, issues.
- Review next steps: Who will do, What, by When.

After the Meeting

Send the follow-up email to summarize the meeting and any next steps.

The 30-60-90 One-on-One

Preparation

Action required of the employee:

- Send responses to the questions below to the manager at least one day prior to the meeting so the manager has time to reflect.

Questions to be answered:

- What has happened recently?
- What are the desired 30-day outcomes?
- What are the desired 60-day outcomes?
- What are the desired 90-day outcomes?

During the Meeting

- Review prior action items.
- Discuss ideas, concerns, issues.
- Review next steps: Who will do, What, by When.

After the Meeting

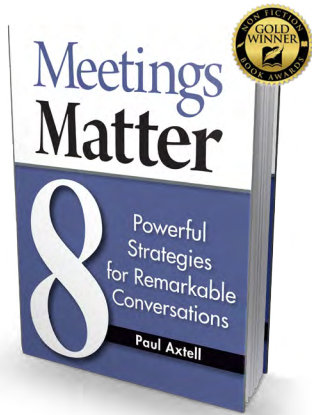
Send the follow-up email to summarize the meeting and any next steps.

RESOURCES FOR ACHIEVING MEETING MASTERY



On the Web

Ask Paul: Paul Axtell's Blog
<http://paulaxtell.com/blog/>



Books

Paul Axtell,
“Meetings Matter: 8 Powerful Strategies for Remarkable Conversations” 2015
<http://paulaxtell.com/books/meetings-matter/>

Related Templates for Leaders

A Protocol for Clearing Questions and Responding to Complaints
<http://www.lucidmeetings.com/templates/paul-clearing-protocol>

Gathering Productive Feedback
<http://www.lucidmeetings.com/templates/rick-gathering-feedback>



All of Paul's Lucid Meetings Templates

<http://www.lucidmeetings.com/templates/designers/paul-axtell>

ABOUT THE AUTHOR

This template was designed by Paul Axtell.

With more than thirty years of experience helping organizations and individuals be more effective, Paul Axtell has honed his insights in executive offices and training programs for everyone from office staff and line workers to managers and team leaders.

A large focus of his work is how to run effective and productive meetings—to turn them from something people dread into useful, productive sessions with trackable results.

Paul is the author of two multi-award-winning books, *Meetings Matter: 8 Powerful Strategies for Remarkable Conversations* and *Ten Powerful Things to Say to Your Kids: Creating the Relationship You Want with the Most Important People in Your Life*.

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