



# Effective 1-On-1 Best Practices

Make the most of your meetings by being strategic.

## How to determine 1-on-1 vs async



Can the agenda of this meeting be discussed asynchronously? Or does there need to be an open discussion?



Are there any significant updates or blockers?



What is the urgency?

## A successful 1-on-1 is

- ✦ A comfortable and safe space for discussion
- ✦ A time to focus on your employees' needs
- ✦ A way to stay aligned on goals
- ✦ Structured yet open for dialogue
- ✦ A place for your team members to know you care
- ✦ Personal but professional

## Determining a Cadence



### Consider Project Cadence

Look at the cadence of your employees' projects. Do they span longer? Or are they smaller and more frequent projects?

### Consider Objectives

Determine the agenda of the meeting. We recommend creating a shared document for you to both contribute to.



## Consider Working Style

Look at the type of working style of each employee. Each employee may have a different working style and will need a different experience because of it. One team member may want more 1-on-1 time than another or appreciates it more. Tailor your cadence to the person.

Cadence can always be adjusted. When a new employee starts, we recommend having a 1-on-1 once a week before you adjust accordingly.

## Here are some agenda items to get you started:

- ✦ Roadblocks or issues
- ✦ Check-in and catch-up questions: “What can I help you with?” and “What have you been up to?”
- ✦ Goal updates
- ✦ Admin topics (ex. upcoming vacations, expense reports)
- ✦ Next steps
- ✦ Career development and coaching

## Things to keep in mind:

- ✦ Stick to the agenda whenever possible.
- ✦ Ask for feedback: “Is there anything I should be doing for you that I am not doing?” or “Anything I should be doing better or more often?”
- ✦ Give the meeting your full attention.
- ✦ Review action items for the next 1:1.
- ✦ Ask, “What else?” (It’s surprising to see what can come up as an afterthought.)

**Use the template on the next page for your meetings**



# Meeting Template

Date:

Time:

Recurring:

Yes  No

Attendees

## Pulse Check

✦ How was your week? At work and in your personal life?

✦ What have you been working on?

✦ How is your workload? Do you need any support or feedback?

✦ Anything I can answer for you?

## Possible Topics:

- Roadblocks or issues
- Goal updates
- Administrative needs
- Priorities

## Meeting Agenda

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Project Updates



## Rank Your Priorities

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_

## Feedback for your manager

## Next Steps

What are the next steps for you?

What should you discuss next time?

## Other Notes