



# One on One Guide

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Patterson Consulting Group



## Set Schedule

- Frequency will depend on the employee's needs
- Block reoccurring time on your schedules
- Make them a habit & avoid cancelling



## Choose Location

- Private area - choose meeting room or office
- If remote, video is preferred over phone
- Avoid distractions - turn off cell phones



## Determine Content

- Prepare ahead of time - set an agenda
- Prioritize important topics
- Schedule follow up meetings, for a deeper topics



## Approach Conversation

- Start positive, share a win or express gratitude
- Problem solve together
- Inquire about results, development, & goals

# One on One Do's & Don'ts



- Shift your mindset from check-ins to development opportunities
- Humanize the conversation and show investment in the employee
- Establish a two way communication model
- Push past the awkward
- Prioritize the employee's needs
- Engage in active listening
- Ask for feedback as their leader



- Come unprepared or empty handed
- Forget what you talked about last time
- Fill the time with empty talk - some will take longer than others
- Forget to take action and follow up on discussion
- Stop having them - for any excuse
- Treat every 1:1 the same

# EMPLOYEE ONE ON ONE TEMPLATE

EMPLOYEE

DEPARTMENT

WEEK

## PERSONAL CHECK-IN

## PROFESSIONAL WINS & CHALLENGES

## ACTIONS/DECISIONS/NEXT STEPS

## GOALS/DEVELOPMENT PROGRESSION

## ACTIONS/DECISIONS/NEXT STEPS

SELF ASSESSMENT & FEEDBACK

ACTIONS/DECISIONS/NEXT STEPS

LEADER UPDATE

ACTIONS/DECISIONS/NEXT STEPS

ADDITIONAL NOTES