

One-on-One Team Leader/Team Member Meetings

A regularly scheduled and productive one-on-one meeting is an important item in a team leader's toolbox. It allows the leader to provide individualized feedback to team members and, when well done, creates an environment for honest two-way dialogue that will also help the leader grow and lead more effectively.

On the next page is a template to help bring some structure to these meetings. Use it for both consistency in meeting planning as well as efficiency in meeting documentation. And, of course, feel free to update it to make it your own.

Success tips:

- Thoughtfully prepare ahead of time (data, events, positive and/or critical feedback and feedforward)
- Begin the meeting with a couple minutes of general personal inquiry, such as follow-up on any previously shared information about family, personal development activities, weekend events, etc. ***Do not cross appropriate boundaries.***
- As trust is established and feedback is shared with you, simply say thank you. Reflect on what you were told and make any changes accordingly.
- If at all possible, do not cancel scheduled one-on-ones. They are as much for the team member as they are for the leader. Respect the opportunity to meet and talk about what is happening. Even a short meeting is better than a cancelled one.
- Add relevant notes soon after the meeting, while the conversation is fresh.
- Save to your electronic personnel records.
- Continually copy and paste for a single running record or create individual records per meeting (if the latter, be consistent in your file-naming convention).
- The cumulative record is useful for ongoing follow-up coaching, disciplinary conversations, performance review preparation, promotion readiness review, etc.

One-on-One Agenda and Documentation for file
(Allow 30 min weekly, 45 min bi-weekly or 60 min monthly)

Meeting date:

Employee name:

1. Production / performance highlights to celebrate:
2. Process / procedure / policy coaching:
3. Go forward follow-up or expectations:
4. How can I help you?
5. Is there anything else you wanted to share or discuss?

Note any other relevant information for file:

Next meeting:

Your initials: