



ONE-ON-ONE GUIDE

LEADER GUIDE

INTRODUCTION

This guide is designed to help leaders prepare for and engage in regularly scheduled one-on-one conversations while also helping their direct reports prepare to fully participate in conversations about performance.

One-on-ones provide opportunities to develop better relationships with staff and promote regular, on-going dialogue. These meetings can cover a wide range of topics including operational information, progress made towards key deliverables, feedback on recent events, coaching for upcoming situations, planning and looking ahead, and any areas of support that might be needed. The aim is to ensure staff and leaders are having the right conversations at the right time, which is a key principle of Align.

PRINCIPLES TO KEEP IN MIND

Performance excellence doesn't just happen; intentionality is required. Regular one-on-ones are an easy way to discuss performance in the flow of work. One-on-one conversations need to be mutually beneficial for staff and leaders. To balance differing needs, establishing a simple agenda for each meeting ensures staff and leaders can address the topics that are most important to each of them at the time.

- Focus on the topics that are most urgent or time sensitive.
- Agendas should reflect a balance of topics important to staff and topics important to leaders.
- Be flexible. Time may run out before all topics are covered. Prioritize remaining topics for the next agenda and conversation.
- Avoid canceling scheduled one-on-one meetings when possible. Reschedule or shorten to navigate around conflicts.

PREPARING FOR ONE-ON-ONE CONVERSATIONS

Meeting schedule: Attempt to have one-on-one meetings with each direct report at least once a month. Research shows that a less frequent meeting cadence is much less effective and can negatively impact staff engagement. Find a date and time that is less susceptible to disruptions or cancellations.

Appropriate environment: The environment should provide a safe space appropriate to the conversation, such as a conference room or office for privileged or sensitive topics. If discussing less sensitive topics, a more relaxed environment such as a coffee shop or outdoor location may be best suited.

Establish an agenda: To have purposeful one-on-ones, work with your direct report to establish a simple agenda so that there is agreement about what is to be discussed during the next one-on-one. Review prior one-on-one conversations, open action items, recent observations, and feedback from others.

- Keep the principles listed above in mind when establishing each agenda.
- To prepare, advise your direct report to review prior one-on-one conversations, open action items, upcoming deliverables, and recent accomplishments.
- Be ready to discuss how they can be supported, areas that are going well or are challenging, and what they most look forward to in their workday.
- As a key element, effective feedback includes setting up the context, providing details about outcomes or behaviors that should be started, stopped and/or continued, and steps for moving forward on any agreements.
- Identify and agree on the action items to be completed by the next conversation. Close the meeting with confirmation of alignment.

TOPICS TO CONSIDER

Use this section of the worksheet to identify key topics to discuss during the next one-on-one conversation. Share these with your direct report and request they do the same. Finalize and share the agenda in advance.

Personal Check-In to Build the Relationship

- Noteworthy events/activities outside of the workplace
- Wellbeing
- Work-life balance
- How are you? Actively listen

Organizational News and Updates

- Share important news/updates about the organization
- Ask if they have any questions
- Address things they've heard/concerns – transparent does not mean full disclosure

Progress Updates

- Open action items
- Progress on key deliverables
- Other urgent/time-sensitive tasks
- Challenges, obstacles, needs to accomplish tasks

Feedback/Coaching

- Feedback on a recent situation
- Coaching and guidance to prepare for an upcoming situation
- Observations on key behaviors

Areas of Focus

- Immediate information, skills, behaviors needed to accomplish tasks and key deliverables
- New/emerging priorities
- Areas of interest for the future
- Additional skills to begin developing

Topics for Next Meeting

- Summary of key points or decisions
- New or ongoing action items

CONDUCTING ONE-ON-ONE CONVERSATIONS

Use the respective sections, depending on the meeting's agenda, as guidance while you are having one-on-one conversations. During the conversation, taking notes is encouraged to ensure that key points are captured and that any questions are answered. A space has been provided below for notetaking.

PERSONAL CHECK-IN

Start the meeting with a brief check-in. Begin by asking how your direct report is doing as a way of showing interest in them as a person. Ask about a recent event or activity they previously mentioned, what their upcoming plans are, a light topic. Depending upon the direct report's preference continue small talk or immediately start review of basic intention and flow for the one-on-one.

As part of getting started, below are sample questions to consider:

- How are you? How are things going?
- What are you looking forward to?

ORGANIZATIONAL NEWS/UPDATES

Share new school/unit, department, or team news in a timely manner. Provide relevant information cascaded by leadership. Stick to the facts and maintain discretion on what information can be shared, where needed.

- Ask if they have questions about the information.
- Address concerns or speculation with facts and transparency. Being transparent does not mean providing full disclosure.
- If you do not have answers, respond by stating you'll look into and will follow up in a future conversation.

PROGRESS UPDATES

Invite direct report to start sharing their progress on open action items, key deliverables, and other urgent/time-sensitive tasks. Review progress against the expected timeline and other measures of success. Help to identify and address challenges or obstacles impeding the expected progress, and provide support and resources needed. Discuss any dependencies that may also be impacted.

- Use active listening to ensure understanding and ask follow-up questions for clarification.
- Remind your direct report how the expected outcomes contribute towards organizational objectives and the role that they play.

FEEDBACK/COACHING

When providing feedback, either positive or constructive, keep the feedback descriptive, solution-focused, and timely.

- Move towards a better outcome instead of focusing on the problem.
- Keep your feedback objective and evidence based. Avoid vague and generic feedback.

Ensure you have ample time to deliver your message as intended. Allow time for your direct report to respond.

- Consider the setting of the meeting and ensure it is appropriate for the type of feedback being provided.

Invite your direct reports to share how they have demonstrated your school/units key behaviors in their day-to-day work. Listen for examples of how the behaviors were used and the impact they had on outcomes

- Discuss strategies for leveraging the behaviors so they result in successful outcomes or discuss specific approaches for change when different outcomes are warranted.

AREAS OF FOCUS

Provide information on any new or emerging priorities that your direct report may become involved in. Invite your direct report to share new areas of interest or opportunities they are seeking. Share information about upcoming or potential opportunities that align to their growth and career aspirations.

- Address how support and resources will be provided to overcome obstacles and challenges identified when discussing progress updates.

SUMMARY AND ACTION ITEMS

Summarize the key points of the conversation and jointly create action items to discuss at the next meeting. Ask if clarification is needed on any of the points covered during the meeting.

- Identify any agenda topics that were not covered. Determine whether they can be moved to the next agenda or if it needs to be discussed sooner.