

One-to-One Guidelines

One of the keys to building and sustaining employee engagement, performance, and retention is regular communication with employees. In addition to team meetings, one-to-one meetings are crucial and allow for an ongoing, two-way dialogue. By providing timely feedback, focusing on development, and checking in on progress against goals, employees have a venue to ask questions, express concerns, and ask for assistance. More than anything else, this process builds an open and sustainable relationship between leaders and their employees.

GENERAL ONE-TO-ONE PRINCIPLES

- Avoid canceling one-to-one meetings.
- Ensure they take place in a private area free from interruptions; don't allow phone/computer distractions during the meeting.
- Encourage the employee to come prepared with their areas of focus for the meeting.
- Remember to assess employee readiness when delegating or assigning tasks.
- Ensure any feedback is timely, positioned appropriately, and provides specific examples related to praise or gaps (based on performance factors).
- Ensure that discussions relating to sensitive subjects are separate from day-to-day matters.
- Ensure the meeting is conversational, and comes from a place of curiosity. Be prepared to ask probing questions and dig below the surface.

FORMAT FOR A ONE-TO-ONE

1. Check in and open by asking how the employee is doing. When appropriate, follow up on a personal item they shared (e.g. their daughter is about to have a baby, are they a grandparent yet? They recently came back from a vacation they'd been excited about, what did they enjoy most about the trip?). Build authentic relationships by learning about your employees and by being vulnerable and sharing appropriately about yourself.
2. Receive an update from the employee on what they're working on – progress, obstacles, accomplishments. This should be a two-way dialogue and an opportunity for the leader to assess readiness & progress, offer to remove obstacles, and surface alternatives. Ideally, the leader should use probing coaching questions to help the employee identify solutions; however, a leader should always be prepared to help the employee if they are unable to identify solutions or remove obstacles on their own.
3. Provide an update to the employee on things that will affect the employee (e.g. projects leader is working on; news from the department or organization; upcoming changes)
4. Feedback & Development
 - One-to-one meetings are appropriate to reinforce previously provided "in the moment" feedback as well as additional feedback.
 - Ideally, seek regular feedback from your employees about your leadership.
 - At appropriate intervals, review the employee's goal progress, adjust timeframes or deliverables as necessary or provide coaching to ensure your employee can achieve expectations. Where progress is slipping, ensure direction, timeframes, deliverables and consequences of not achieving are clear.
 - Check-in & reinforce development plans. Adjust plans as necessary based on organizational constraints.
5. Review logistics related to upcoming time off or business travel/time away from office – for both you and your employees. Consider discussing coverage options if appropriate.

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