

One-on-One Meetings - instructions

Purpose – Connect and empower direct reports; help keep people on track

Process:

First meeting with employee, share your intent (ex. I want to make sure I'm helping you with what you need to do your job effectively). Make an effort to connect with the person; build trust.

Give ownership to employee – Let the person know that he/she will be keeping the form and filling it out prior to your meetings.

Go over instructions in your first meeting. (Be patient with the process. It often takes several meetings before people open up and you begin to see the benefit of these meetings.)

Do your best to set a regular time to meet, with an agreed upon time frame (weekly meetings are typically 15 – 30 minutes, unless of course you are combining with another meeting.) Avoid cancelling or postponing; this sends a message that the person is not that important. Agree that if one of you does need to change the meeting time, it is up to that person to ensure the meeting occurs.

General format:

1-What's Up:

(This should be anything that they want to talk about – important to let the person own this. It builds trust when you listen.)

2-What are your top 3 metrics: (this helps you see how he/she is thinking and help him/her prioritize when necessary)

A)

B)

C)

3-Are you stuck – do you need any help?

(It is important to empower people at this stage – be aware if they really need advice, or do they need coaching? Lean more toward coaching, using questions, rather than telling.)

Consider D, I, S, C behavior styles. How will you adapt for each?

Name: _____ Meeting Date: _____ Time slot: _____

Your DiSC Style(s): _____ His/Her DiSC Style(s): _____

What's Up?

Top 3 Metrics:

1)

2)

3)

Are you stuck? Do you need help?