

One-on-One Meetings That Work™

Planning Guide

Team Member _____ Meeting Date _____ Time _____

CARE 10 minutes

Personal, Events, Activities, Special Days, Travel, Family, Life Goals, Recreation, Hobbies, Background, Passion, Life & Work Balance

COMMUNICATION 10 minutes

Professional Development, Role, Updates, Projects

COACHING 10 minutes

Leadership, Priority Management, Decision-Making

ACTION PLANS

Start Date	Action Plan	Owned by	Date Due	Completed

CARE

- How is your wife/children/family doing?
- What did you do (have you planned for) this weekend?
- When was the last time you reviewed your Life Plan?
- Do you feel like you are working in your area of passion?
- Are you fulfilled?
- How are you doing with work/life/family balance?
- (Ask specific questions about events, special days, vacations, recreation, hobbies.)

COMMUNICATION

Professional Development

- *What am I learning that I can share?
- Tell me one thing you learned this (last) week?
- In what areas do you see the most opportunity for improvement?
- Tell me about your short-term goals? Long-term goals?

Role

- *What can I clarify or emphasize – about upcoming projects? Events? The organization? The team?
- What roadblocks are in your way?
- What areas of your role do you feel very confident about?
- What makes you uncomfortable?
- What do you have questions about?
- How does your business vision address this problem you are experiencing?
- What recommendations would you like to offer?
- What is one thing I can do to support our team (organization) more effectively?
- Where can I be most helpful?
- How can I serve (help) you?

Projects

- *In what areas can I provide positive feedback?
- *What can I delegate?
- *What can I assign them that will allow them to grow?
- *What projects do I need updated on?
- *What is the status of _____?
- What projects are you working on?
- Which projects are ahead of schedule?
- Will you still be able to make the deadline?
- How are things going this week?
- How did it go last week?
- How are you planning to approach this?
- What do you think should be done?
- When do you think it should be done?
- What needs to happen to complete this?
- What have you learned from this project?

COACHING

Leadership

- *What behaviors need to improve?

Priority Management & Decision-making

- What are you spending your time on?

ACTION PLANS

New (future)

- *What action plans need to be created?
- *What do we need to make better/faster progress on?
- How could that be better?
- What should be done differently?
- What can you stop doing? Or, What can someone else do?
- What would you like me to follow-up on next week?

Follow-up (due or past due)

- *What actions plans do I need to follow-up on?
- What about your leadership is hindering progress in this area?

*Questions to consider prior to the meeting.