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**ONE-ON-ONE MEETINGS  
THAT WORK™**

**The #1 Tool for Your  
Most Important  
Relationships  
at Work**

**Guide and Template**

# 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?

#### 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?

#### 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?

### 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?

#### Follow-up (due or past due)

- \*What actions plans do I need to follow-up on?

- In what areas do you see the most opportunity for improvement?
- Tell me about your short-term goals? Long-term goals?
- 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?
- 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?

- What can you stop doing? Or, What can someone else do?
- What would you like me to follow-up on next week?
- What about your leadership is hindering progress in this area?

\*Questions to consider prior to the meeting.

# One-on-One Meetings That Work™

## Team Member Agenda Form\*

Please use the following agenda to help you prepare for our meeting.

### Accomplishments & Status

A list of all current projects, with one or two sentences describing progress and status of each.

### Blocked/Waiting on

Note any roadblocks that are currently keeping projects from progressing. Describe the roadblock for each in one or two sentences.

### To do

Make a high-level to-do list of what you would like to accomplish within the next week.

### Areas to Develop

Note areas of personal and professional development and what activities you have undertaken/would like to undertake to develop in those areas.

### Goal Tracking

Review your monthly, quarterly or yearly goals. Note progress - You should be making steady progress toward fulfilling those goals.

### Action Plans

Record the results of previously established action plans including whether or not they are complete.

