



## **ONE-ON-ONE GUIDE**

### **INDIVIDUAL CONTRIBUTOR GUIDE**

## **INTRODUCTION**

This guide is designed to help individual contributors prepare for and engage in regularly scheduled one-on-one conversations about performance with their leaders.

One-on-ones provide opportunities to develop better relationships with leaders 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.
- Plan accordingly to 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 your manager 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 leader 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, review prior one-on-one conversations, open action items, upcoming deliverables, and recent accomplishments.
- Be ready to share and discuss where you need support, areas that are going well or are challenging, and what you most look forward to in your workday.
- As your leader provides you feedback, ensure you understand the context, details about outcomes or behaviors that should be started, stopped and/or continued, and steps to move forward on any agreements.
- Identify and agree on the action items to be completed by the next conversation. Close the meeting with a 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 leader and request they do the same.

### Personal Check-In to Build the Relationship

- Share noteworthy events/activities outside of the workplace
- Provide insights about workload and deadlines impacting wellbeing
- Share successes/challenges with work-life balance
- Share how you are doing overall

### Organizational News and Updates

- Request important news/updates about the organization
- Ask questions about important organizational news/updates
- Seek facts about rumors/concerns you have heard

### Progress Updates

- Provide update on open action items
- Share progress on key deliverables
- Updates on other urgent/time-sensitive tasks
- Explore challenges, obstacles, tasks to accomplish

### Feedback/Coaching

- Request feedback on a recent situation
- Request coaching and guidance to prepare for an upcoming situation
- Request observations on key behaviors

### Areas of Focus

- Identify immediate information, skills, behaviors needed to accomplish tasks and key deliverables
- Request clarity on new/emerging priorities
- Express areas of interest for the future
- Explore 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 questions are answered. A space has been provided below for notetaking.

### PERSONAL CHECK-IN

**Start the meeting with a brief check-in. Prepare to share how you are doing as a way of connecting with your leader as a person. Leader may ask about a recent event or activity you previously mentioned, what your upcoming plans are, or other light topics. Reciprocate by asking similar questions in return. Depending upon your preference, continue small talk or request that the conversation transition to the agenda.**

As part of getting started, below are sample questions that may be asked:

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

### ORGANIZATIONAL NEWS/UPDATES

**Leader may share new school/unit, department, or team news so you have them in a timely manner. Keep in mind that your leader may not be able to communicate all the information you are seeking. Your leader will provide transparency on what can and cannot be communicated.**

- You will be invited to ask questions about the information.
- Prepare to share concerns or speculations.
- Leaders may not always have all the answers. In such cases, expect that they will respond by stating that they will look into it and follow up in a future conversation.

## PROGRESS UPDATES

**Your leader will invite you to start sharing your progress on open action items, key deliverables, and other urgent/time-sensitive tasks. Share progress against the expected timeline and other measures of success. Share challenges or obstacles impeding the expected progress. Request that your leader provide support and resources as needed. Discuss dependencies that may also be impacted.**

- Use active listening skills to ensure understanding and ask follow-up questions for clarification.
- Ensure you understand how the expected outcomes contribute towards organizational objectives and the role that you play.

## FEEDBACK/COACHING

**Be open to receiving both positive and constructive feedback. Listen to understand instead of listening to respond.**

- Move towards a better outcome instead of focusing on the problem.
- Feedback should be objective and evidence based. Request clarification and specific examples, where needed.

Your leader will aim to provide ample time to respond to any feedback provided.

- Request for additional time if you feel it is needed.

Be prepared to share how you have demonstrated your school/units key behaviors in your day-to-day work. Provide examples of how you demonstrated the behaviors 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**

Your leader may provide information on any new or emerging priorities that you may become involved in. Share new areas of interest or opportunities you are seeking. Jointly explore upcoming or potential opportunities that align to your growth and career aspirations.

- Be open about the support, resources, or training you need to accomplish your key deliverables.
- Be open to suggestions and ideas provided by your leader. There are many ways to develop and grow.

**SUMMARY AND ACTION ITEMS**

Ensure you capture the key points of the conversation and jointly create action items to discuss at the next meeting. Be sure to ask for clarification if needed on any of the points covered during the meeting.

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