



**THE DEFINITIVE**  
**1:1 CONVERSATION**  
**GUIDE FOR LEADERS**



# WELCOME TO THE DEFINITIVE 1:1 CONVERSATION GUIDE FOR LEADERS!

As a Human Resources and operational people leader with large teams and dollars under my care, I fully understand how limited your time is and how challenging it can be to spend it most effectively. I imagine you too have had busy days with nothing accomplished. I've been there and lived to tell about it.

One of the most powerful leadership routines I have ever created has been prioritizing the one-on-one time with my direct report team members. A stronger team around you allows you to bend without breaking. It also allows your team to grow and feel fulfilled at work while you know you've had a hand in that. There is no better feeling.

My goal with **The Definitive 1:1 Conversation Guide for Leaders** is to take the guesswork out of how to best spend your time developing your team. This Guide will help you:

- **Commit** to regular meetings with your team, and keep them
- Hand off some ownership and **autonomy** of preparing for the meeting to your team members
- Rotate through all of the **goal setting, talent development and personal check-in** time that we tend to leave out when we focus only on tasks

You will have all of the preparation and tools necessary to hold incredibly productive and meaningful one-on-one time with your direct report team members. Commit to giving this new model a chance for one quarter. Twelve weeks. At the end you will have a chance to see what's working and what you need to tweak. If you put the heart into it, you and your team members will be better for it, I promise.

Your mission, should you choose to accept it, is to create trust, psychological safety, and a place for growth for your team.

Much love,



# THE WHY AND HOW OF 1:1 CONVERSATIONS

## Why have regular 1:1 conversations?

Leaders, YOU are the biggest lever we have to create positive change in our organizations, affect our team members' careers and enhance how they feel about work. If you are unconvinced that leaders make a difference in belonging, then hear this. According to Gallup, **one in two employees have left their job** to get away from their manager. One in TWO!

Gallup also estimates that the manager accounts for at least 70% of the variance in employee engagement scores across business units. I think this is the closest thing to a silver bullet that we will ever find.

**You** are the defining factor in creating safety, personal connections in the organization, developing talent and performance, and showing people they are safe to bring their whole selves to work. Giving focused, regular attention to your team members is the best way to do this.

## With whom should I have regular 1:1 conversations?

Anyone who reports directly to you (e.g., you are their boss, you write their review) or dotted line to you. Also consider having regular time (perhaps at a lighter cadence) with anyone who you work with on important projects or teams, or anyone you are formally or informally mentoring.

## How often should I have 1:1 conversations?

The frequency and duration of your 1:1 meetings is up to you and your team. I recommend weekly for people with whom you work very closely. You may determine that every other week works best for you, or in some cases monthly (as a minimum frequency). You can also determine the length of time in your plan.

*cont.*

Let's say you have 10 direct reports (this is a lot, by the way, but also not uncommon). It may be unrealistic to commit to one hour per week to 1:1 conversations because this would be 10 hours a week! Perhaps you do thirty minutes every week (5 hours), or thirty minutes every other week while rotating half one week and half the other. That scenario means 2.5 hours a week, which you are probably spending anyways in a much less focused and effective manner.

What is most important is that this time is sacred on your calendar. You do not cancel. You know that you can count on that time with them, and so does your team. I built in time to my calendar to account for vacations taken, or if I had to move my usual Monday check-ins I made sure that my calendar had space to move them elsewhere. Canceling is a sure signal that your team should not take that time seriously, or bother to prepare.

*(Note: Of course there are emergencies when these meetings should in fact be canceled. This should be the exception, not the rule, and not as a result of them getting "bumped" regularly for more important stuff. What is more important than your team??)*

## How do I schedule all of these 1:1 conversations?

Find times that work for you that are unlikely to get bumped by other commitments.

Having the same time as a standing appointment is an easy way to set a routine that can be executed well.

Have a back-up plan for when those times don't work. For example, if you regularly meet on Monday with a team member but it is Memorial Day and your organization is closed, have an easily executable plan for when to move the 1:1 time.

Ensure you are able to schedule your 1:1 meetings ideally in-person or virtually in-person (e.g., via video). Additionally, you want to make sure that you are both in a place that is free of distraction, private and where you both feel you can be open and candid.

**PRO TIP:**

Schedule your  
1:1 meetings  
well in advance  
on both of your  
calendars.

## What should my 1:1 conversations include?

You will always catch up on “stuff”: updates of recent events and ongoing projects. I am guessing you do this now and don't need any help fitting that in since for most leaders this is the **ONLY** topic they regularly talk about with their teams!

Once you have **prepared your team** to own and drive the conversation, your team members will begin by sharing what they see as their most important updates. Chances are many of the things on your list will be addressed by them before it's your turn.

1:1 time should also include you **getting to know each other** personally, you providing specific **recognition** for the work they've done, and ending meetings with **clear takeaways** if someone has an action item to complete. These routine meetings should include discussion about what they want in their **career**, as well as what skills are their **strengths** and what personally needs work. These routines should help them see their path in the conversation, **connect** them with broader networks and mentors, and to just really see how they are **feeling**.

You will notice the guide prompts you to **ask questions** more than give answers. This is by design. It is based in **coaching principles** where you facilitate the discussion, the team member maintains ownership of their work and you learn more while talking at people less.

You won't talk about all of these things in every meeting, of course. This guide will give you an easy **12-week rotation** to fit all of these conversations in quarterly (if you were to meet with your team weekly) or at a minimum twice per year (if you meet with your team every other week). The rotation will also help **hold you accountable** to having the conversations we might normally forget about or casually omit because they are less comfortable.

Also, because this is a predictable standing appointment, you know that you can provide performance improvement feedback during this time without it feeling like a “big event.” These regular conversations feel more like one big **continuation** of your conversation and relationship. Nothing is worse than scheduling a surprise appointment on your team members calendar so they can stress about what they might have done wrong for the next 24 hours. That is an example of feedback that feels like an event.



# PREPARING FOR YOUR 1:1 CONVERSATION ROUTINE

## Prepare Your Team: Set Expectations

If you haven't been this intentional with your 1:1 time before, your team might understandably be a little confused about the changes. Eliminate confusion and wasted time by communicating new expectations up front.

This might sound like:

- "I am trying something new so that we can count on this time together"
- "I would really like to commit to this time and use it well"
- "This might feel different than what we have done in the past, and that's okay"
- "Here is what I would like you to come prepared with [fill in details], and here is what you can expect from me"
- "I'd love your feedback on how this is working for you after we have given it some time"

## Prepare Yourself: Make a System

### How will you prepare for these conversations?

**Pro tip:** Keep notes throughout the week, rather than try and prep in one sitting (either on the template itself or in an easily accessible place for you throughout the week when an idea comes up that you want to discuss with your people). My best system was to have one folder for each person, and I just put notes in the folder (either digitally or hard copy) of what I wanted to include in our next 1:1 meeting. I had to do very little thinking (and very little forgetting!) about critical things to discuss in the next session.

### How will you track commitments and To-Do items made during these meetings (for either them or you) so you follow-up until completion?

You might commit to doing something, and you want to follow through on that as well as close the loop by communicating the outcome back to your team member. You also want to end each meeting with both you and the team member clear on what they will be working on, specifically, and by when.

### What notes will you make during or directly after the conversation to create a quality record?

Go back and add key details about what you said, or what was committed to so that you have an accurate and quality record of the conversation that actually happened.



# 1:1 CONVERSATIONS: QUARTERLY PLAN

You have a lot to cover with your team members, and this quarterly rotation will help fit it all in and ensure you don't leave out any critical parts of their growth, development or engagement.

If you follow a weekly 1:1 cadence, then you will cover each of these topics every quarter, or four times per year. If you follow a bi-weekly cadence, you will cover each of these topics at least twice per year. You will find each of these topics in a conversation-ready 1:1 guide in the next several pages!

## Quarterly Rotational Topics by Week

Week 1 - Goal Setting

Week 2 - Career Trajectory

Week 3 - Overall Business Review

Week 4 - How Are You Feeling?

Week 5 - Key Project Updates or Goal Updates

Week 6 - Relationships, Teams and Networks

Week 7 - Feedback for the Leader

Week 8 - How Are You Feeling?

Week 9 - Goal Success Review

Week 10 - Personal Leadership Strengths and Opportunities

Week 11 - Mentors, Sponsors and Connections

Week 12 - How Are You Feeling? Or, catch up on any missed quarterly topics.



## Post-12-Week Self-Check

At the end of the 12-week rotation, do a self-assessment here of what worked and what didn't. Gather feedback from your team on how to tweak to your needs to maximize your 1:1 conversations.

**Start**

**Stop**

**Continue**

## HOW TO USE THIS GUIDE

The guide is foolproof - once you know how to use it! There is space to add your prepared thoughts, to make note of key items brought to the table by your team member, and to jot action items and owners during the meeting. Use it as a planning form, a log of the actual conversation, and a reference of commitments afterward.

On the following pages of this guide you will see a one-page weekly guide that you can use over and over again, and add in the rotational topic each time. Or, the following 12 pages will be a guide specific to each of the 12-week rotational topics, and you could use the custom form for that week's rotational topic. Whatever works best for your system and routine is great; I have included them both here for flexibility.

### Before

- Write down your "what I want to cover today" notes on the form when they come to you, throughout the week (includes feedback you want to give, projects you need an update on, or any other important messages to convey)
- Prepare your thoughts, suggestions and empowering questions for the rotating topic section
- Always be a situational leader and consider what approach works best for this person

### During

- Make notes of key topics presented by your team member
- Update your prepared notes to reflect a quality record of what you actually said (e.g., cross out omitted items, add in extra topics)
- Be fanatical about completing the last section together to decide action items, timelines, and action owners before ending the meeting

### After

- Transfer "To Do" items that you own to your list or calendar to ensure they are done when you said they would be and close the loop on communication back to the team member
- Ask yourself these questions: How effective was this conversation? What are my next steps?
- Communicate to your team member what they should prepare for the next rotational topic



# 1:1 CONVERSATION GUIDE

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 1 [GOAL SETTING]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Goal Setting

- What are your top three most important goals to focus on this quarter?
- What strengths will you leverage or skill sets will you grow to accomplish these goals?
- What checkpoints, dates, and measurements will you include to measure success?
- What support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 2 [CAREER]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Career Planning

- What parts of your work do you enjoy the most? The least?
- What skills would you like to grow?
- What next role(s) would you be interested in working toward?
- What big dreams or long-term career goals to do think about?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 3 [BIZ REVIEW]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Total Business Review

*If you have key performance indicator (KPI) reports or review processes, use them here.*

- What are the top three business successes in your area?
- What are the top 2-3 areas for improvement in your area?
- What actions are you taking in this next month/quarter to move your business area forward?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 4 [CHECK-IN]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: How are you feeling?

*Goal: Really ask, really listen, really see them, and really care.*

- How are you doing... no really?
- What are you excited about or grateful for? (Can be work or life)
- How are you feeling about your place at work right now?
- What support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 5 [GOAL UPDATE]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Big Projects/Goals Update

- What progress have you made towards your goals or on key projects so far?
- What is getting in your way?
- What is working well that you can leverage more of?
- What resources/support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 6 [RELATIONSHIPS]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Relationships, Teams & Networks

- How supported do you feel by your team/coworkers?
- What key relationships in other areas of the organization would be helpful to you?
- How are you nurturing your network within the organization, and in the community?
- Who can I connect you with to help facilitate your growth?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 7 [FOR LEADER]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Feedback for the Leader

*SAY: I always want to create a place where it is safe to provide me with feedback about my leadership. You can always offer feedback, and I want to make official time for it now.*

- What are some things you like that I can keep doing?
- What are some things I should consider stopping?
- What would you like to see me begin doing?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 8 [CHECK-IN]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: How are you feeling?

Goal: Really ask, really listen, really see them, and really care.

- How are you doing... no really?
- What are you excited about or grateful for? (Can be work or life)
- How are you feeling about your place at work right now?
- What support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 9 [GOAL CHECK]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: How did goal setting turn out?

- How did you do hitting your goals this quarter?
- What was successful about your goal planning process? What wasn't?
- What have you learned that you will incorporate in the next quarter?
- What resources/support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 10 [STRENGTHS]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Personal leadership strengths & opportunities

*Goal: Articulate which of their leadership traits are strengths and opportunities for growth.*

- What leadership traits do you see as your strengths? *[And here is what I see...]*
- What leadership traits do you see as areas needed growth? *[And here is what I see...]*
- What projects or work groups are good opportunities to deliberately practice these?
- *[Offer suggested projects/activities for targeted growth]*

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 11 [MENTORS]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: Mentors, Sponsors & Connections

*Goal: Facilitate personal connections with a broad range of supporters for the team member.*

- What mentors do you have for support, either in or outside the organization?
- What sponsors in our organization are supporting your work?
- What connections with people would you like to make in our org, or the community?
- How can I help?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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# 1:1 CONVERSATION GUIDE: WEEK 12 [CHECK-IN]

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Leader Name: \_\_\_\_\_

## Personal check-in:

- ASK, "What is new?" or "What is happening in your world this week?"

NOTES:

## Team member's updates:

- What's on your list today?

NOTES:

## Important things I want to cover today:

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## Rotational topic: How are you feeling? OR Catch up on a missed topic

*Goal: Really ask, really listen, really see them, and really care.*

- How are you doing... no really?
- What are you excited about or grateful for? (Can be work or life)
- How are you feeling about your place at work right now?
- What support do you need?

NOTES:

## Things that are going well/recognition:

## Offer of support:

- What do you need from me? or, What support do you need?

## Action items and commitment dates (and action owner):

ACTION ITEM	BY WHEN	ACTION OWNER
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## BONUS!

Flex your **coaching skills** by asking questions rather than always giving answers. You will learn more, talk less, and your team gets to stay in the driver seat of their own work. Win-win.

Here are some **empowering questions** you can use during your 1:1 conversations:

What are you most proud of?

How does that fit into your plan?

What challenging you right now?

How can I help?

What support do you need?

What's on your mind?

What is holding you back?

And what else?

What scares you about that?

What are your next steps?

What's another way to look at that?

What's the real challenge here for you?

What is really bothering you about this?

*[To teach your organization's leaders a foundation for coaching, check out [my workshop](#).]*



## LOOKING FOR MORE RESOURCES?

Master the One-on-One Meeting | Julia B. Austin | Harvard Business School

The Art of the Awkward 1:1. | Mark Rabkin | Medium

The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever | Michael Bungay Stanier

**Need some support? Check out my leadership coaching and training topics.**

*Be the leader we've all been waiting for.*

Much love,



## FOLLOW KATIE'S WORK!

Leadership coach. Keynote speaker. Creator.



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Hidden Brilliance: A High-Achieving Introvert's Guide to Self-Discovery, Leadership and Playing Big