

CHECKLIST FOR ONE-ONE MEETINGS

Welcome to the One-on-One Meeting Checklist. This guide is designed to help you conduct impactful and productive one-on-one meetings. Follow these directions to make the most out of your one-on-one meetings:

Before the Meeting:

1. **Schedule:** Set a convenient time for both parties, ensuring it doesn't conflict with other important commitments.
2. **Agenda:** Prepare a clear agenda outlining the topics to be discussed. Share this with the participant in advance.
3. **Goals:** Define the goals and objectives of the meeting. What do you want to achieve by the end of the conversation?
4. **Preparation:** Gather any necessary materials, reports, or documents that will be relevant to the discussion.

During the Meeting:

5. **Connection:** Begin with a warm and welcoming greeting to establish rapport and create a comfortable atmosphere.
6. **Listening:** Allow the other person to speak and express their thoughts. Listen actively and avoid interrupting.
7. **Agenda Review:** Briefly go over the agenda to make sure both parties are aligned on the topics to be discussed.
8. **Open-ended Questions:** Use open-ended questions to encourage meaningful dialogue and gather detailed responses.
9. **Updates:** Discuss progress on ongoing projects, tasks, and any challenges that need attention.
10. **Feedback:** Provide constructive feedback on performance, highlighting both strengths and areas for improvement.
11. **Goals Check:** Review previously set goals and discuss any adjustments or updates.
12. **Career Development:** Discuss the individual's career aspirations, growth opportunities, and development plans.
13. **Obstacles:** Identify any roadblocks or obstacles the participant is facing and work together to find solutions.

14. **Recognition:** Acknowledge and appreciate the participant's efforts and accomplishments.
15. **Time Management:** Keep the conversation focused and on track to ensure all agenda items are covered within the allotted time.

After the Meeting:

16. **Action Items:** Summarize key action items and decisions made during the meeting. Assign responsibilities and deadlines as needed.
17. **Follow-up:** Send a follow-up email summarizing the discussion, action items, and any next steps.
18. **Documentation:** Keep records of the meeting notes and action items for future reference.
19. **Feedback Collection:** Encourage the participant to provide feedback on the meeting process and whether their expectations were met.
20. **Continuous Improvement:** Reflect on the meeting's effectiveness and consider adjustments for improvement in future meetings.

Remember, the key to a successful one-on-one meeting is to create an open and supportive environment where both parties can communicate effectively and work towards shared goals. Adapt the checklist as needed to suit the specific needs and dynamics of your working relationship.



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