

One-on-One Meeting Tips & Sample Agenda

Here are some tips and techniques for effectively and efficiently conducting one-on-one meetings with each of your direct reports. Feel free to add your own elements to complement those included here.

Timing

Schedule the meeting regularly and in advance. Meeting monthly is ideal, but bi-monthly or quarterly meetings will also work. Allow 20-30 minutes and block the time on your calendar with no interruptions. To make this easier, schedule three one-on-one meetings in a block of 90 minutes on your calendar. (This avoids the stop-and-start mentality that can be an energy zapper.) Allocate 20 minutes for each meeting with 10 minutes in-between to take notes and refocus for the next meeting. This way your mind is focused on creating connections, and the process goes more smoothly.

Try this for several months. Initially it may seem like a lot, but over time you will see that it might just be the best use of 20 minutes when it comes to improving team member engagement. Be sure to flex your schedule so you can meet when folks are already working or are in the office for other meetings (all shifts). Asking someone to come in on a day off for a 20-minute meeting is de-motivating, and that's what we are trying to avoid.

Agenda

Managers use a variety of formats for one-on-one meetings. Here is a sample agenda that adds a specific layer of engagement to the meeting. Remember, this is a shortcut, so use what's working already and tweak it to directly make the connection to engagement.

1. What's New?

This simple question is a great way to start the meeting. Just ask and listen. Getting to know team members as individuals is the perfect way to build your relationship. Of course if you know about important life events that have occurred – upcoming milestones, vacations, continuing education, etc. – ask about those as well.

Special Note for Nurse Managers

Many nurse managers have more than 75 team members reporting directly to them across three shifts with 24/7 coverage. I can read your mind... “I can't possibly meet with folks monthly!” I understand. For you, I recommend two options.

Option 1: Work with your “middle” layer of leaders (Clinical Coordinators, full-time Charge Nurses, Patient Care Coordinators, etc.) to teach them how to conduct monthly one-on-one meetings with their team members.

Option 2: Meet with each team member quarterly. That breaks down to approximately two 90-minute time slots weekly for one-on-one meetings. This comes out to six people each week who get your undivided attention and time. This timing is a minimum frequency for one-on-one meetings to be effective.

2. What's Working?

Start with the good news. Ask team members to share things that have been going well and then share your thoughts on progress since your last meeting. This is a great time for genuine praise. Ask about areas that were identified in the last Engagement Survey that you are working on to make sure that progress is being made.

Looking at what's working in the following three areas can be helpful:

- Performance (quality, productivity)
- People (compliments, team efforts)
- Projects (milestones, accomplishments)

Check in about the parts of their job that they identified as making them feel **satisfied, energized and productive** (you should have that posted on the board in your office from the Match Game). You can also use the *Satisfaction Snapshot* referenced in Shortcut #6 to learn more specifically what's important to a team member and his or her real-time satisfaction level. Ask how you can help the team member create more opportunities to do those things and ask how the team member plans to create more opportunities for him or herself. Focus on internal drivers of engagement (autonomy, self-sufficiency, gratitude, etc.) to promote shared accountability.

3. What Needs Work?

Ask for ideas and suggestions for improving the department or job. By challenging the employee to come up with solutions, you can make sure this isn't a gripe session. What are areas of development he or she seeks? Really listen so the employee feels that his or her opinion counts. This is a great time for owning challenges you have contributed to, sharing possible solutions or apologizing if warranted.

Looking at what's NOT working in the following three areas can be helpful as well:

- Performance (internal roadblocks, external barriers)
- People (inter- and intradepartmental challenges)
- Projects (conflicting priorities, missing tools or resources)

4. What's Next?

If any action items arise during the meeting, summarize and agree on who is responsible, the time frame and method of accountability. Do not feel like this is a "monkey exchange" where you take the proverbial monkey off the team member's back and put it on yours. Share responsibility for engagement moving forward.

I've created a *One-on-One Meeting Grid* in a separate PDF to help you keep track of the agenda and what you talked about (with shared accountability) so that you don't have to spend time doing that. You can quickly and easily download a copy of the *Grid* at www.6ShortcutsToEngagement.com/BonusTools.

