LTS Leadership that sells

A FREE GUIDE

5 steps to transform your 1-to-1s

Track and drive your team member's progress by documenting your 1-to-1 following a regular, predictable format.

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AT A GLANCE

The 5 steps for better 1-to-1s

Book repeating calendar entries: 15 mins prep + 30 mins session. Use a shared, rolling document to track everything that happens & the plan ahead. Follow an agenda like this rigorously every time:

1 Check in

How are they doing? What's on their mind today? Build rapport: open the conversation personally. Connect with them by asking questions that go beyond work; get to know what they're like outside of work.

2 Update

Updates on objectives from last time, share successes and congratulations. Ask: "are you on track?" If not, "what do you need to get back on track?" (Avoid asking "why not".)

If you deal with data or numbers (sales or marketing, for example) keep those for a separate session.

3 Feedback

1. State concretely what you observed.
2. State the impact that their behaviour had, based on what you observed.
3. Ask: help me understand what happened / what's going on?

4 Coaching

- **Goals** (What is your ideal outcome?)
- **Reality** (Where are you? What have you tried already?)
- **Obstacles and options** (What's stopping you? What could be your first step?)
- **Way forward** (How are you going to do it? How can I help?)

5 Planning

Write and share a joint plan, detailing what actions will be taken and by whom. Both of you will have tasks related to the challenges discussed.

Use a rolling, shared document to update actions as they happen and add issues as they arise.

WHY IT MATTERS

Track and drive your team member's progress

By documenting your 1-to-1 following a regular, predictable format.

CHECK IN | UPDATE | FEEDBACK | COACHING | PLAN

Most people's 1-to-1 meetings with their managers are a wandering waste of time and energy.

I'm going to show you how to do them well and turn this special moment between you and your team member into a powerful lever for progress and opportunity in your organisation.

The technique is fundamentally simple: follow a regular, predictable format and track progress in a rolling, shared document.

I started as a manager of five people. We were all in the same room so we just talked all the time. We knew what was going on. That seemed to be enough at the time, although I discovered later that it wasn't.

Later in my career, I ended up with eight direct reports who were directors of teams of managers in seven different countries in five different time zones. The only way we could hope to manage was by developing a rigorous, tracked way of staying in touch and staying on top of what was going on.

If you want to move your business forward faster, you need to stay connected with your team, right?

You need to know what they're doing. They also need to know what's going on as much, if not more than you do!

There are only a limited number of ways you can drive any business forwards. You only have a very few levers that you can pull.

The only way you move your business forward is by moving your people forward.

A key lever to drive progress is in the special moment you have each week in your 1-to-1 session with each of your team members.

GETTING STARTED

Schedule 15 + 30 minutes every week

It's a special moment for them because it's their time, it's not yours. Even if you gain as much from the session as they do, it's all about them not you.

Sometimes you're going to have a lot to talk about, sometimes not so much, so just go with the flow.

Put 30 minutes a week into your calendar on repeat.

Now add in 15 minutes beforehand to prepare, again on repeat. That's it.

If the idea of running 1-to-1s is new to you or makes you uncomfortable, think about this:

Remind yourself of your positive intent

Remind yourself of the positive intent behind these moments. Everyone has good intentions, everyone wants to do what they say they will.

With a regular 1-to-1 you are helping people to feel good about themselves because you're holding them accountable. You're doing it to make progress, and when people do their jobs well, they feel great!

You're not doing it to catch people out. You're **checking IN not checking up**.

In the sailing ships of old they had a thing called a binnacle: a big compass. You chart the journey in advance, and you use this 1-to-1 compass to check that you're on the right course.

If you go off course you make a course correction. You help the crew or your colleague navigate in the fair weather when it's easy and in the bad weather when it's difficult.

You help them trim their sails to catch the wind or avoid the storms.

> **How are you doing your 1-to-1s today? What are they like? How is yours with your manager?**

THE PURPOSE

What is a 1-to-1 for?

We have this key moment in our week where we can check in and try to chart our progress. You probably talk quite a lot with your team, so you know a lot about what's going on.

So, how do you make these special conversations really meaningful for both of you?

My experience and research says you need a formal structured moment together to do this for several reasons:

When things go wrong, you have a structure to fall back on

When things go wrong and stress enters the conversation, you both know you have a consistent way to solve problems and you have a formal note of things that you can fall back on to keep you both on track.

So you should follow a structure in every session that makes it predictable and familiar for both of you. This lets you focus on the issues at hand.

Move your business forward by moving your people forward

Predictability and a consistent structure helps you move things forward one day at a time. You track your successes and fix problems together.

Difficult conversations or difficult decisions for you or your team member are in the open: you can't hide or ignore poor performance.

Retain your people by developing them

Paying attention to people's performance and helping them to improve on a weekly basis is the best way of developing them. You get better results, more quickly.

You get higher retention when people are personally successful, and if they are being developed and have an open relationship with you, their manager, they're less likely to quit.

Unlock potential

You'll also find out what people's talents are this way, and it helps you to build your team's capabilities. If you can build your individual and the team success you're building the company success, and the more that you know your team members, the better you'll understand how to motivate them and how to direct their work.

Getting to know people takes time and effort. Structuring and planning this makes sure that it actually happens.

THE PAY-OFF

What does a good 1-to-1 deliver?

For everyone, it's clarity of purpose

You connect meaningfully with your team individually and you share your overall goals and the purpose of your work. One person at a time.

And you do it repeatedly over the weeks and months and in the best way that your individual team member is going to understand.

Repetition, consistency, and clarity alone are going to drive more success than you can imagine.

For the organisation and the team, it's better, faster team work

By working together on shared goals, the team will deliver better results more quickly, minimising unnecessary back-and-forth both within the team and with external parties.

You will see success faster by keeping everyone on track and making sure they have access to the right people and the resources that they need with fewer delays.

For the individuals themselves, they'll be happier, more productive people

There was a study in 2015 from the University of Warwick in the UK that showed, unsurprisingly, happier people are more productive.[1]

Your relationship, or the lack of your relationship with your boss is a key part to your contentment at work.

When you hold people accountable they're more likely to be successful. If you think about the times when you've developed professionally and personally you were probably helped by a degree of external accountability.

Whether it was a coach, a mentor, a leader, a parent, or a teacher, your internal desire and motivation to do the work was probably triggered and then maintained by something outside of yourself.

People want to succeed and meet their commitments, and you're simply helping them achieve that success.

For you, the manager, you get more time and greater insight

By spending less time dealing with unhappy or uncooperative people, misaligned priorities, or redoing poorly executed tasks, you'll have significantly more time to focus on meaningful work.

Having one pair of eyes and ears is good, but multiplying that by your entire team makes you wiser as you can gather, understand and know more about what's going on than you could alone.

[1] Oswald, A. J., Proto, E. and Sgroi, D. (2015) 'Happiness and Productivity', *Journal of Labor Economics* 33(4).

BEFORE THE MEETING

Prepare or fail

Before you launch into your next newly energised 1-to-1 meeting, you've got to prepare.

> **Make performance reviews easier**
>
> When you have a performance review with someone, just go back to the shared document, scroll through and pull out all the successes and challenges from there. More reliable and much easier.

Preparation is key to success

You both need to prepare. If you don't prepare, you'll end up having a nice chat and a pleasant meeting, but it's going to be hard to have a meaningful exchange if you've not spent some time to prepare yourselves.

Use a shared document between meetings

Use a shared document you can both access during and between meetings. Dropping ideas or notes into it will help greatly with your preparation.

You then track progress in the same place.

Adjust your style to match theirs

Make sure that you are adjusting your style to the people you're working with.

Your approach is going to be different for different people. You keep the same agenda, but some people want to go into every detail, others won't want to speak as much, and you can adjust to their approach.

Spend 50% of the allotted meeting time again in planning

In terms of planning, you want to use additional time equal to half of the meeting duration.

If you have a 30-minute weekly session, that's an extra 15 minutes of preparation. If you've got a team of six that's just 4½ hours a week to drive your business forward through your team, as this should be your main focus.

Make sure the planning time is a recurring event in your calendar as well as the meeting itself. Be sure that your team member does the same.

Never improvise

This is the most important opportunity you have to impact the performance of your team. You need to use it and respect it by planning ahead every time.

THE MEETING

5 steps in 30 minutes

Our structure is simple. Having planned your conversation for 15 minutes, you take 30 minutes to cover:

CHECK IN | UPDATE | FEEDBACK | COACHING | PLANNING

1 Check in

"Hi! How you doing? What's been exciting for you this week? How are the kids / hamsters / team doing?"

It's as simple as that. Build some rapport, open personally.

Your schedule is busy. Your team members' schedules are busy.

You need to respect these special moments with your team. You need to value your team members and connect with them as they connect with you.

Asking questions that go beyond work lets you get to know what they're like outside of work, who's important to them? What's going on in their lives?

The by-product of knowing them better is that the feedback sessions will get easier and become more powerful as you learn how to work within their style and they learn how to work with yours.

2 Update

Make sure that this does not end up as a pure business status update session.

This is important if you deal with data or numbers, sales results, financials and the like. Keep those to a separate specific session.

This is a strategic meeting with your team member. You're updating on objectives rather than numbers.

Ask "are you on track?" If they're not, follow up with "what do you need to get back on track?" Avoid asking them "why not".

"Why" questions make people defensive and more concerned with saving face than fixing problems.

This is about them as a human as much as about their business activity. They share their successes. You give congratulations.

Hint: find out if there are other people involved that you should congratulate later.

Learn from their insights

This is where you get to understand what are they seeing that you are not seeing.

What did you learn at that trade show? You listened to that industry podcast, what are they saying that I should know about?

3 Feedback

This is where you give and you get feedback.

Remember what feedback is: it's your *concrete observations* and the *impact* of that observation.

Here is the feedback formula:

- You state concretely what you observed. **"I observed that..."** (This would stand up in a court of law, facts only.)
- You say **"the impact of what I observed is..."**
- Then you ask **"help me understand what happened?"** or **"help me understand what's going on?"** and sit quietly while they speak. Again, avoid "why" questions. You want results, not excuses.

> **Try Three-Before-Me**
>
> *"Before you come to me with a problem, I want you to try 'Three-Before-Me'.*
>
> *Try three things: speak to someone, work through a plan, think through options, test out an idea.*
>
> *I'll still help you, of course, but I want to avoid being your bottleneck, and for you to have thought the problem all the way through."*

4 Coaching

A big part of your job as a leader is to help your team overcome the challenges they face while helping them grow in their roles.

The easiest way to do this is to coach them. Help them to understand what they are facing and work out how to solve their problems themselves.

You probably won't know what challenges your team member is facing unless you ask.

Try asking:

- *"What challenges are you facing that are preventing you from getting your work done?"*
- *"What's the single biggest challenge you've had this week?"*

Then use the simple GROW coaching model here. Here are some basic questions to ask:

- **Goal:** What is your ideal outcome?
- **Reality:** What have you tried already?
- **Obstacles & options:** What's stopping you? What could be your first step? What are our options?
- **Way forward:** How are you going to start and how can I help you?

5 Planning

Now you plan for the future together and bring the session to a close with a joint plan of action.

- What actions are you going to take and by when?
- What actions are they going to take by when?

Record the actions in your shared document and update your notes as you make progress during the week.

A template you can use today

The one-page 1-to-1 tracker keeps your rolling, shared notes in the same five-part shape every week: a running list of actions, and a block for each session.

Date	
Check in	
Update	
Feedback	
Coaching	
Plan	Who does what, by when

Download the 1-to-1 tracker (PDF)

CHECK IN | UPDATE | FEEDBACK | COACHING | PLANNING

PITFALLS

Things to avoid

Avoid cancelling or moving the 1-to-1 at short notice.
Don't do that.

How often has that happened to you?

It used to happen to me all the time and I felt disrespected and unimportant.

Never cancel, but if you have to reschedule, give them plenty of time. Give them at least 2–3 days' notice.

Anything less is disrespectful and shows how unimportant you think these meetings are.

Avoid being unprepared.
Don't be the person who turns up thinking that you can make it up as you go.

Guaranteed this is the one time that your team member has prepared in crazy detail for something important to them and you're sitting there twiddling your pen, looking unprepared and disrespectful.

Avoid asking "why" questions.
You don't want defensive, face-saving excuses, you want results. Try using "what" or "how" instead.

Avoid broadcasting on Channel You.
"Welcome to Channel Me, where I'm going to talk solidly for the next 40 minutes (while overrunning and messing with your day)."

Don't broadcast. Don't hog the conversation. You're trying to facilitate a conversation.

Ask simple questions and listen deeply to the answers.

You're not waiting to speak. You're not thinking about what to say.

Think about what you want to ask rather than what to say.

Try my favourite question: **"And what else?"**

Find out more. You don't want their first answer, you want the right answer.

Avoid making it a status update.
Keep the balance. You are not looking for a series of status updates. This is a strategic meeting. It's a conversation between two business professionals trying to drive their business forward by driving an individual's performance upwards.

BONUS

Every 6–8 weeks

Let the conversation wander on purpose.

I like to have a longer session every so often, just to have a chance to broaden the discussion and find out more about what's going on in their world.

Schedule 45 minutes for this one, maybe an hour. Make it a walking meeting, or change the venue. If you're hybrid, make this your face-to-face session.

"And what else?"
It's such a powerful question. If you ask it at the end of your session and sit quietly, you'll be amazed at what you learn.

"Are we doing right by you?"

"Are you going in the right direction fast enough?"

Remember that you are on their side, facing problems together. It's not you against them, you're working with them to move forwards together.

Objections

How can we solve complex problems in 30 minutes? That's too short!
When you operate under a constraint of having only 30 minutes, you need to be straightforward and concise.

If you can fix something in 2 minutes, great. If not, plan to solve it together in a separate session.

30 minutes for 5 sections (6 minutes each) doesn't leave much time!
Each part is equally important; however sometimes you'll have a lot to say, other times, not so much.

Be sure to cover each part because the day you miss one out is the day it really matters to your team member.

And...

Get your own feedback.
Every so often, dig in and find out what people think about your 1-to-1s.

Ask them what you should stop, start and continue doing?

How can we improve the agenda for us?

Never assume, always ask.

After a break

Book an hour session to catch up when either of you comes back from a break. Having that in the calendar makes it less stressful to 're-enter' after time away.

FREE RESOURCES

Thank you for reading

If this guide was useful, here is where to go next. Everything is free, with no sign-up.

The 1-to-1 tracker

A template you can use today: one page for your rolling, shared 1-to-1 notes.

leadershipthatsells.com/guides/one-to-one-tracker.pdf

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