

The One-on-One Meetings Toolkit

*Everything Leaders and Employees Need
to Have Productive One-on-Ones*



Introduction

One-on-one meetings, sometimes called touch-base or check-in meetings, are meant to provide leaders and their direct reports with an opportunity to connect on a personal level, build rapport, review progress, share updates, and plan for the future. When both parties are fully engaged in their one-on-one meetings and committed to making the most of them, employees of [one study](#) say it benefits them in the following ways:

- Feel closer to their leader, team, and organization
- Allows them to give and receive feedback
- Feel listened to and heard
- Feel more positive
- Helps them be more successful in their role

However, despite the benefits of one-on-one meetings, according to [a 2022 study](#), they might not have the intended impact, especially if they're treated as a "check the box" activity. Out of the 250 direct reports who were asked to rate their experience with their one-on-ones, almost half rated the experience as suboptimal.

Researchers note that this can happen when leaders view one-on-one meetings as a burden, do not host them on a regular basis, or mismanage them. As a result, employees feel "disconnected, both functionally and emotionally." This does not mean that direct reports do not bear any responsibility for the success of the meeting. Quite the contrary, actually. Employees must also be willing to prepare themselves, equally contribute, and engage with their leaders in a two-way conversation.

Fortunately, this toolkit was designed to help both leaders and employees maximize their time together in one-on-one meetings. It contains templates, checklists, and questions that can lead to more productive and meaningful one-on-one meetings when used together.

What This Toolkit Contains

1. The 3 R's One-on-One Meeting Template
2. One-on-One Meeting Agenda Template
3. Pre-Meeting Email Template
4. 101 One-on-One Meeting Questions
5. Before, During, and After Checklist for Leaders
6. Before, During, and After Checklist for Employees
7. Post-Meeting Follow-Up Email Template



The 3 R's One-on-One Meeting Template

The 3 R's stands for **Rapport**, **Review**, and **Readiness**. This is a simple but effective one-on-one meeting template that encourages you to take a balanced and holistic approach. The idea is to break up your one-on-one meetings into three equal parts. For example, if your one-on-one meeting is 30 minutes long, you would spend 10 minutes on each one of the R's. If your meeting is an hour in length, then you would spend 20 minutes on each. Now, let's breakdown what you should discuss in each part.



RAPPORT

Start one-on-one meetings by building rapport. Spend the first third connecting with as individuals who have lives, responsibilities, worries, and interests outside of work. Then, as you get to know each other better, not only will you build mutual trust and respect, but you will over time, be able to pick up on verbal and nonverbal cues that indicate how each other is really is doing.

REVIEW

The middle part of your one-on-one meeting should be spent reviewing the direct report's current workload, priorities, goals, and challenges. In other words, this is the time for status updates. To keep this tactical and administrative part of the meeting moving along, tell attendees upfront what they need to prepare and bring to the one-on-one meeting.

READINESS

To close out the one-on-one meeting, spend the last third of focused on more strategic, big-picture, and long-term topics. We call this section Readiness because it should be about getting the direct report ready to take on their future, whatever that may be. As such, topics of discussion may include development goals, training opportunities, professional goals, or career plans.



One-on-One Meeting Agenda Template

Just as you would create an agenda for a meeting with many people, you should create one for your one-on-ones as well. A one-on-one meeting agenda will help your employees understand what the meeting will be about and how they can prepare for it. Access the fully editable, digital Google Docs version of this template [here](#).

OBJECTIVES

Use this space to highlight the objectives of your meeting.

1.	
2.	
3.	

ACTION ITEMS

Use this space to highlight what attendees need to prepare, read, or do before the meeting.

SCHEDULE

Use this table to break down what will be covered and the time allotted to it.

Topic/Discussion Items	Time Allotted



Pre-Meeting Email Template

As the leader, once you've put together a draft agenda for your one-on-one meeting, you will want to send it over to your employee ahead of time. Best practice states that a meeting agenda should be sent no later than two business days prior to the meeting. This will give them the time they need to adequately prepare or research. In fact, here is a template you can use.

Hi [Employee Name],

In advance of our one-on-one meeting on [Date] at [Time], I have attached a draft of the agenda we will follow.

- *Recap of your current projects and assignments*
- *Review [XYZ project]; please bring a copy of what you have so far and any feedback or support you need from me to continue and hit our deadline*
- *Confirm action items to be completed before our next meeting*

I want this time to be as beneficial to you as possible, so please let me know if there is anything you want to add to it.

Best,
[Your Name]





101 One-on-One Meeting Questions

Asking thoughtful and intentional questions during one-on-one meetings can help provoke conversation, strengthen your working relationship, build trust and credibility, and prompt feedback. Below you will find 101 one-on-one meeting questions that employees can ask their bosses and leaders can ask their employees.

61 QUESTIONS FOR LEADERS TO ASK EMPLOYEES

1. How are you? How has life, in and outside of work, been for you since we last talked?
2. Are you looking forward to anything right now, professionally or personally?
3. What word would you use to describe your current state of mind?
4. What's taking up most of your headspace right now, even if it's not work-related?
5. What would be the best use of our time today?
6. What are your current priorities?
7. What will be your main priorities between now and the next time we meet?
8. Is there anything you need my feedback or approval on immediately?
9. What has been taking up most of your time since we last met?
10. How do you feel about your current workload and capacity?
11. Where could you use my help/support?
12. How are you tracking against your deadlines?
13. What is your biggest concern right now, workwise?
14. Are you facing any obstacles that you could use my help removing?
15. Are you anticipating any obstacles or problems that I should be aware of?
16. What did you do this week that made you feel proud or accomplished?
17. Have you achieved any "wins" or milestones since we last met?
18. Would you say you're feeling stressed or burned out right now? If so, what can I do to help alleviate that?
19. What are some of your telltale signs when you get stressed or burned out?
20. Is there anything about your job that keeps you up at night?



21. Can you disconnect from work at the end of the day? If not, what is preventing you?
22. Do you have everything you need from me to proceed as planned?
23. Are you uncertain about any directions I have given you? If so, what can I clarify?
24. Do you have any feedback for me?
25. Are you getting the feedback and coaching you need from me?
26. When I need to provide you with feedback, how would you like me to do so?
27. Is there anything I could do more of or better that would put you at ease?
28. Do you know what is required of you in your role? If not, what can I clarify?
29. Do you have any ideas about how we can work together better?
30. Do you feel empowered to do your best work? Why do you think that is?
31. Do you have the tools/resources you need? If not, what exactly would you need?
32. What is your favorite part about your current role?
33. What's one thing about your current role that, if we changed, would improve your overall well-being and sense of work-life balance?
34. Is there a part of your job you enjoy that you haven't had time to do lately?
35. Does your current role make you feel challenged? Is that a positive thing? If not, what would make you feel more challenged?
36. Are there any projects, committees, or teams in which you would like to participate or be more involved?
37. Are there any areas of your job that you'd appreciate more or less direction from me?
38. What do you think you need most from me to be successful in your role?
39. Do you have any strengths, skills, or talents that feel underutilized in your role?
40. How comfortable do you feel asking either myself or the team for help?
41. Do you feel aligned with our [team/company] mission?
42. Is the vision for our team and our contribution to the organization clear?
43. Do you feel you're on the same page with the [team/department/company]?
44. Is there anything you think we should do that we aren't currently doing?
45. What about your work inspires/engages/motivates you?
46. As of right now, what is your biggest source of motivation?



47. Is there something or someone who has inspired you lately?
48. Who do you look up to for motivation or mentorship?
49. Have you encountered a situation recently that you wish you had handled better? If so, what would you do differently?
50. What do you think you learned from the situation/ experience/mistake?
51. How do you feel about your progress on your [monthly/quarterly/yearly] goals?
52. Are there any goals that we need to revise or update?
53. How can I support you in meeting your [monthly/ quarterly/yearly] goals?
54. Are you currently working to achieve any specific career goals?
55. Does your current role align with your career aspirations?
56. Where do you see yourself in the next five years?
57. How can I support you in achieving your professional goals?
58. Is there a skill you think would be beneficial to learn or develop?
59. Is there anything you have wanted to learn but haven't had time to?
60. Do you have any development goals you're working towards that you'd like me to know about so I can support you?
61. Is there a training program, event, or conference that would support your professional development?





40 QUESTIONS FOR EMPLOYEES TO ASK THEIR BOSS

1. What word would you use to describe your current state of mind?
2. What's taking up most of your headspace right now, even if it's not work-related?
3. Did you have any work and non-work wins/ highlights since we last met?
4. What can I do to help you between now and the next time we meet?
5. Is there anything I could do for you that would make your life easier?
6. Is there anything you've been meaning to do but haven't had the time that I can take care of for you?
7. Do you have any feedback for me?
8. Does anyone on our team need extra support? Can I help them in any way?
9. I'm feeling overwhelmed by [insert concern here]. Could you [insert ask here]?
10. Would you say I have my priorities in the right order? If not, how would you change it?
11. Do you think our priorities are aligned right now?
12. Is there a part of my job that you would appreciate more visibility into?
13. Would you like to receive status updates on this task/ project?
14. How do you like to receive status updates?
15. Is there something I could be doing differently?
16. Is there anything you would like me to prioritize or spend more time on?
17. Is there anything you would like me to spend less time on?
18. If you were in my shoes, how would you handle this situation?
19. What do you think success looks like in my role?
20. Am I meeting the expectations you have of someone in my role?
21. Can you describe what your performance expectations are of me?
22. If I need your feedback or approval, what's the best way to ask you for it?
23. Is there anything else I can prepare for these meetings that would be valuable to you?
24. Do you have any ideas about how we can work together better?
25. Who do you look up to for motivation or mentorship?



26. I'm interested in taking on additional responsibility in the future. What do you think I need to work on to get there?
27. Is there a skill I could learn/hone that would make me better at my job?
28. One of my professional/development goals is to [insert goal here]. Can you think of any ways you can help me achieve that?
29. What are the learning opportunities available to me?
30. Are there any development opportunities you recommend I investigate/take advantage of?
31. I believe I could learn a lot by joining [project/committee/team]. Would that be possible?
32. Who on our team can I learn something new from?
33. This is where I see myself in [time frame]; how do you see me getting there?
34. Looking to the future, what are you most excited and concerned about?
35. What are senior leadership's top priorities right now?
36. Are you satisfied with our team's progress toward our shared goals?
37. Is our team operating at our full potential? If not, what's standing in our way?
38. Is there anything we could do better as a [team/department/company]?
39. What else could I do to help the [team/department/company] succeed?
40. Are there any opportunities we're missing out on as a [team/department/company]?





Before, During, and After Checklist for Leaders

Hosting effective 1:1 meetings with your employees goes beyond just the time spent in the meeting itself. There are things that you as a leader need to do things before, during, and after to ensure the meeting objectives are met and that you both feel it was a valuable use of your time. To give you an idea of what those things are, here is a 1:1 checklist for you to use going forward until it becomes second nature.

BEFORE

- ☐ Define the objectives of the meeting
- ☐ Review the notes from your last 1:1 so you can follow up on any action items
- ☐ Draft up an agenda
- ☐ Send your agenda at least 2 business days before your 1:1 and ask your employee if they have anything they want to add to it
- ☐ Outline anything specific you need your employee to prepare, share, or research prior to the meeting
- ☐ Write out a list of questions you want to ask your employee so you don't forget

DURING

- ☐ Show up and end on time
- ☐ Mute your phone and computer apps
- ☐ If meeting virtually, turn on your cameras
- ☐ Recognize achievements and milestones at the start
- ☐ Follow the 3 R's 1-on-1 meeting template
- ☐ Make a point to ask if your employee is experiencing any obstacles or if they have any concerns
- ☐ Listen more than you speak
- ☐ Take notes of action items
- ☐ Work together to define the meeting action items and set a timeline for them
- ☐ Recap accountabilities and clarify timelines, expectations, and tactics
- ☐ End with words of encouragement or appreciation

AFTER

- ☐ Send an email recapping the action items or decisions made during your 1:1 meeting
- ☐ Keep your employee informed about the status of the things they ask you to review or approve
- ☐ Provide answers to questions your employees ask during the meeting that you couldn't answer at the time (If you're still looking for answers, tell them that. It will be better than providing no update at all)
- ☐ Send an invite or reminder for the date of your next 1:1 meeting



Before, During, and After Checklist for Employees

As an employee, 1:1 meetings with your boss can be nerve-wracking. What will they ask? Did you prepare enough? What if they ask you something you don't know the answer to? To help alleviate some of that stress and anxiety and set you up for success, use this 1:1 meeting checklist for employees as it covers what you need to do before, during, and after the meeting.

BEFORE

- ☐ Review the status of your KPIs, tasks, projects, and goals
- ☐ Review your notes and action items from the previous meeting
- ☐ Write down a list of things you want to discuss, review, and ask
- ☐ Ask your boss if you to prepare, share, or research anything specific for the meeting
- ☐ Choose questions beforehand
- ☐ Gather the documents or links you need
- ☐ If you need approval on anything, gather copies for your boss and present them in their preferred format
- ☐ Review the meeting agenda and add additional talking points, if necessary

DURING

- ☐ Show up prepared and on time
- ☐ Mute your phone and computer apps in order to minimize any distractions
- ☐ If meeting virtually, agree to both turn on your cameras
- ☐ Be open and honest, but tactful and professional
- ☐ Take notes of anything you agree to do, look into, or provide updates on
- ☐ Ask your boss to clarify their expectations and directions, as needed

AFTER

- ☐ Begin working on the action items you agreed to take responsibility for during the meeting
- ☐ Provide any additional information or updates your boss asked for ASAP (If it's going to take longer than expected, tell them that you're working on it and will keep them posted)



Post-Meeting Follow-Up Email Template

In order to consider a one-on-one meeting truly successful, action items must be followed up on after the meeting to move closer to attaining objectives or goals. Draw up action items throughout the meeting with an owner, a clear description, and a deadline. Then, send these items in a post-meeting email so that you both have your accountabilities outlined in writing.

Hi [First Name],

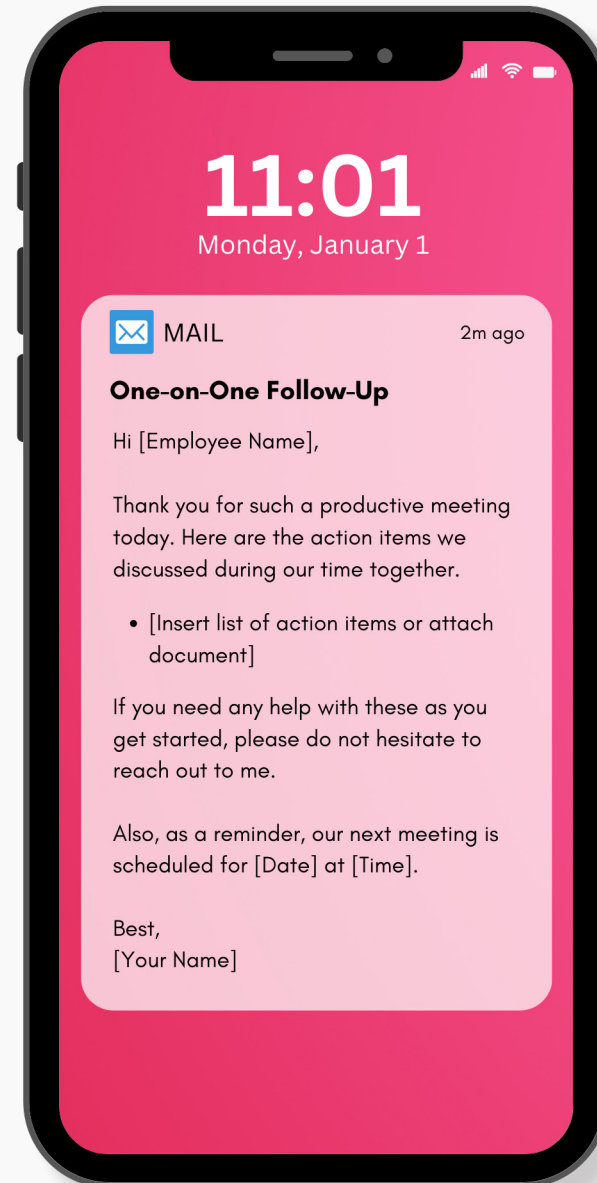
Thank you for such a productive meeting today. Here are the action items we discussed during our time together.

- *[Insert list of action items or attach document]*

If you need any help with these as you get started, please do not hesitate to reach out to me.

Also, as a reminder, our next meeting is scheduled for [Date] at [Time].

*Best,
[Your Name]*



Next Steps

Whether you're running your first one-on-one meeting with employees or your 1000th, they should be treated as much more than just a "check the box" activity. These are real opportunities to connect, support, coach, and develop employees. To maximize the impact of your employee meetings, look to [leadership development programs](#), like those offered by [Niagara Institute](#), to hone your active listening, communication skills, and overall leadership effectiveness..



About Niagara Institute

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