1:1 AGENDA TEMPLATE
& QUESTIONS FOR DIRECT REPORTS

OVERVIEW & PURPOSE

As a manager, you need regular intelligence and pulse checks from your direct report. Above all practices, this is the single most effective. The benefits of your regularly scheduled 1:1s include:

1. Strengthened relationships between leaders and their teams.
2. Improved productivity.
3. Greater loyalty and trust.
4. Meaningful, personalized feedback.
5. Dedicated time to check in on goals and align on progress and next actions.

SUGGESTED 7-POINT AGENDA FORMAT: 30 MINUTES EVERY 2-3 WEEKS

1. Check-Ins:
   - Ask about their overall well-being both at work and at home. Is there anything they need from you to minimize stressors? Anything you can support them with?
   - Be sure to share something about your own life and well-being.

2. Accomplishments: Is there anything new or exciting for this direct report—personally or professionally—over the past 2-3 weeks? A recent success, win, or achievement?

3. Issues/Challenges:
   - What is the most recent issue or challenge they are facing, if any?
   - Ask how they are addressing the issue/challenge
   - Ask what support they need or what obstacle you can help remove.

4. Discussion: Projects, objectives, or questions that you'd like to discuss?

5. Follow-up: Check in about any items you want to address since you last met.

6. Support: Ask how you can be most helpful to this colleague over the next two weeks.

7. Feedback: In the spirit of common growth, provide one piece of feedback to one another that can benefit you or the team.

A SAMPLE OF QUESTIONS TO ASSIST YOU IN A 1:1

- What are you most concerned about now—perhaps a frustration, a policy, or an unfinished project?
- If comfortable sharing, how are things on the homefront…any new projects or plans?
- How are you doing with maintaining boundaries between work and home responsibilities? Integration?
- As you think about our team, what are we <u>not</u> doing that we should be doing?
- How are you feeling about your contribution to the goals/company?
- What has been a key learning for you from the past few weeks?
- What support or resources do you need to help you be fulfilled in your work?
- Are you feeling challenged professionally? Any new experiences or learning opportunities you want to consider?
- Anything else you want to express or discuss?

FURTHER READING

7 Tips For Making Every One-On-One Meeting Count:

www.15five.com/blog/transformational-1-on-1-meetings

FACILITATING COLLABORATIVE & DYNAMIC CONVERSATIONS

OVERVIEW & PURPOSE

Team members will appreciate the distinction between what the team or cross-functional team is doing (output and content) and how they are being asked to respectfully engage with one another (input and process). The facilitator leads with empathy and structural care so that all participants feel heard and safe for discussion—especially if there may be disagreements.

OUTCOMES

- Identify some of the benefits of facilitating collaborative outcomes.
- Name issues that can sidetrack committee or teamwork.
- Value the dual nature of output and process within committees or teams.
- Learn proven ways to build strong facilitation skills.

BENEFITS TO FACILITATING DYNAMIC CONVERSATIONS & OUTCOMES

- Participants experience leadership and care from the facilitator.
- Team or Committee members, more safely and productively, accomplish their work.
- Facilitated skills are modeled for participants to learn from and share in.
- Participants feel respected for their time and contribution; "not wasting their time."

ISSUES OR DYNAMICS THAT SIDETRACK EFFECTIVE TEAMWORK

- Dominant participant(s)
- Side conversations
- Arguments or conflicts within the group
- Monopolizers or ramblers
- Lack of required preparation

OUTPUT & PROCESS: TWO DYNAMICS TO BE AWARE OF AND MANAGE AS THE LEADER/FACILITATOR

Within teams, two dynamics naturally happen, output activities that make and produce the work or outcomes. And, the second dynamic is process; the interpersonal behaviors and decisions that influence the quality of relationships responsible for the output. Both output and process occur and are required. What is important is the leadership/leader needs to understand and make time for both dynamics.

- Output for each team or committee member: All participants choose to be fully engaged in the deliberations, actions, and output while being sensitive to and empathic with one another the entire time
- Output behaviors and activities by membership; this is what you see and hear:
    - Discussing goals, expectations, standards
    - Planning activities or tasks to achieve outcomes
    - Ownership of necessary roles, competence, and experience
    - Identifying resources needed for success
    - Active decision-making and plans for the next steps
- Process: The process side of teamwork is the more fluid and interpersonal side of the equation when facilitating collaborative and psychologically safe teams. It is shared experience, curiosity, vulnerability, and trust that facilitates both healthy communication <u>and</u> output by the team. A commitment to people leader care and emotional intelligence is required for shared success.
- Delegate process responsibilities to a select member of the team (rotated every two meetings): Encourage the use of a process *observer*.
    - Must be fully aware of the process being used, and facilitated, for the benefit of the participants.
    - All participants take responsibility for the process, but one Observer is assigned to ensure norms are being honored and the agenda is being followed. In many ways, they are co-pilots to the team leader or facilitator.
- Process behaviors and activities demonstrated; this is what you see and hear from others:
    - Emotional safety and care; vulnerability and honesty with input and differing views.
    - Civility and empathy at all times.
    - Participation by all members; not a select handful.
    - Shared leadership for the discussions and decision-making; all contribute to these conversations and accountabilities.
    - Conflict is being handled directly but sensitively.
    - Ongoing feedback to one another during teamwork and conversations.

SKILLS TO PRACTICE FOR STRONG FACILITATION

- Ensure 4 interpersonal norms are identified for more honorable and respectful conversations.
- Make sure team or committee members are acquainted—and at ease. For instance, ask: "What excites you about this particular work for the success of the team?" and "What skill sets, qualities, or experience do you bring to the team?"
- Use voice inflections and change tempo and tone when appropriate.
- Be firm with distractions and interruptions; and with norms being violated.
- Make eye contact with all participants; redirect eye contact to the person speaking.
- Check in periodically with the timekeeper and process observer; ask "How is everyone doing?"
- Improve your ability to ask and manage coaching questions to ensure engagement and autonomy.

ADDITIONAL SKILLS TO PRACTICE FOR STRONG FACILITATION

- Read the non-verbal energy and body language of the members of the team:
  - Watch for reactions; pay attention to tone and facial expressions.
  - Be attentive to questions: what is said, and how it is said from others.
  - Ask open-ended questions to check in for understanding and progress.
- Increase involvement of others:
  - Have participants discuss a key point with another person before opening the discussion to the whole team/committee.
  - Ask the participants a question: "How do the rest of you feel about Brad's approach or recommendation?"
  - Ask: "Would someone be willing to summarize the next steps we named?"
  - "Process observer, how is the team participating? Suggestions?"
- Cascading Communications:
  - What needs to be communicated from the conversations? In what ways and how much?
  - Summarize what is to be communicated or acted on from the meeting—and by when.
  - What are we communicating to our people; and by what varied means?
  - It's always important to over-communicate; facilitates clarity and engagement.

Note: It will likely take 3 meetings at 60-90 minutes each to engage fully in this conversation, and to tease out the team's four norms. In this case, the process of discovering and defining the norms is just as essential as the output of the four norms.

INTERPERSONAL NORMS

INTENTIONAL VS. ACCIDENTAL NORMS

These are behaviors, qualities, or actions that anchor how this team interacts and produces when they are together. This practice or norm will facilitate psychological safety.

NORM 1: _____

Definition/Description:

Success looks like this:
-
-

Violations look like this:
-
-

Notes:

NORM 2: _____

Definition/Description:

Success looks like this:
-
-

Violations look like this:
-
-

Notes:

NORM 3: _____

Definition/Description:

Success looks like this:
-
-

Violations look like this:
-
-

Notes:

NORM 4: _____

Definition/Description:

Success looks like this:
-
-

Violations look like this:
-
-

Notes:

SBI TEMPLATES FOR FEEDBACK

OVERVIEW & PURPOSE

According to the Center for Creative Leadership, SBI is a simple three-step process for giving effective and impactful feedback. The SBI model asks us to:

1. Describe the SITUATION (S) – what happened? Who was involved?
2. Describe the BEHAVIOR (B) – what exactly did the person say/do?
3. Describe the IMPACT (I) – what was the impact/result of the good performance on you or others?

Professional feedback is a two-way exchange that supports performance, recognizes good work, and clarifies expected behaviors. We give feedback and we receive feedback. Providing feedback is an act of leadership with and for the development or improvement of others. We reinforce and/or redirect the behaviors and actions of those we work with when we provide feedback. The following two activities will support you in organizing your thinking and conversation as you provide feedback.

ACTIVITY: Reinforcing Feedback

Think of someone whom you want to recognize and provide feedback for a job well done. Use the template below to plan for the feedback and validation conversation. Remember, you are recognizing good work practices, behaviors, and strong efforts.

What was the SITUATION?	
What was the observed BEHAVIOR?	
What was the IMPACT?	
Express your appreciation. You look forward to more.	

ACTIVITY: Redirecting/Correcting Feedback

Redirecting feedback communicates that a behavior or practice you've observed doesn't meet your expectations and that you would like it to change or improve for both success and credibility. The framework for delivering redirecting or corrective feedback is essentially the same as for delivering reinforcing feedback. You will need to make clear exactly what the situation is, the behavior is, and its impact. Specificity and data will be important to share—and with empathy. The main difference comes at the end. You will need to ask questions and engage in a discussion to reach an agreement on the specific steps that are going to be taken to address the issue or improvements.

Think of someone whom you want to provide redirecting feedback when you are in your place of work. Use this model to plan for this redirecting conversation for both support and improvement.

What was the SITUATION?	
What was the observed BEHAVIOR?	
What was the IMPACT?	
Finally, ask for context or the other person's viewpoint. **List possible suggestions for improvement, ideally discovered together.** **Set a deadline.**	