HOW TO

Effective 1:1s

Leaders can schedule two very different types of one on one (1:1) conversations with their direct reports. We sometimes mistake one type for the other, yet they should be different and distinct.

Assumptions

Leaders
You genuinely care and are invested in the development and well being of your direct reports. You are flexible and capable of adapting your communication style to meet the needs of your directs.

Direct Reports
You are invested in your own development and quality of work. You are open to feedback, and you are willing to provide constructive feedback. 1:1s might be new to you, or you are looking for ways to learn from your manager.

Genuine = Trust

Being genuine and constructive is critical. As a leader, if you use this information and just go through the motions without taking the time to make the actual investment with your direct reports, the 1:1s will likely seem hollow and insincere...
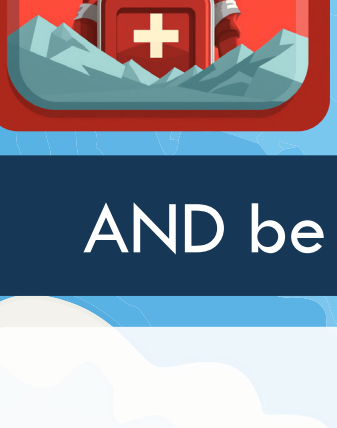
DO actually care.
DO be consistent.
DO match words with actions.

DON'T be insincere.
DON'T be inconsistent.
DON'T just go through the motions.

AND be sure to actively develop and maintain psychological safety for your team!

There's a written version of this infographic if you'd like to read it at
https://www.jasonowens.com/articles/effective-1-on-1s

A Tale of Two 1:1s

Development 1:1

Development 1:1are Focused on the development, growth, and support of the direct report.

- What they need and how they're developing or making progress on development goals.

- Remain focused on the individual and not on their specific project work or operational tasks. [1]

- Explicitly state the time is for the direct and is not intended to be project tasks status meeting.

- Provide a list of topics to address or speak to in each session.

EXAMPLE TOPICS

- Progress on professional or personal development.

- Issues or "blockers" that the leader may be able to help address.

- Ideas, general questions, concerns, etc.

- Check in on well-being.

RECOMMENDED

Development plan? Set the expectation up front as to whether direct coaching is appropriate and whether there should be specific progress or accomplishments reviewed.

As a leader you are also responsible to point out when the approach a direct report is taking to development and growth might not align with the expected pace or timeline.

Be genuine, the overall well-being of team members is important.

Providing an explicit opportunity in consistent, recurring manner for them to share information can make it easier for someone to discuss an issue.

[1] Why? One, personal development and growth will suffer. Two, a constant emphasis on output rather than the individual, especially when there had been time set aside for the individual, can easily lead to the impression that a leader or company does not care about the individual. And three, if the direct was not expecting to discuss task or project status, they may not be fully prepared, resulting in a less than effective or uninformed session, leaving all parties frustrated.

Status 1:1

Status 1:1s are specific to project work, operational issues, task, or progress should be discussed.

- Should be scheduled by a direct report with their manager or leader. [2]

- Leaders, let your directs know when and in which format you expect to receive the information.

- Not intended to be a complete project or portfolio update, just provide basic information, get a decision, and/or identify topics that need discussion and a possible solution.

RECOMMENDED

For weekly or every other week updates, try the following. See a full example at the end of this document using the structure:

Updates
These are statements. No debate or discussion should be needed. Each bullet should provide information. If written concisely in one or two sentences the item should stand on its own. Updates should require the least amount of time/discussion and can be reviewed by a leader beforehand if provided in advance.

Decisions Needed
These are Yes or No questions, concisely written in a manner that a leader can provide a yes or no decision. These may be follow ups to previous discussions or are simple enough that the question can be posited without debate or research. A minimal amount of time/discussion should be needed, and these can also be reviewed by a leader beforehand if provided in advance.

For Discussion
These are topics that are not so simple and often require discussion, debate, or additional details in order to make an informed decision. The reason for bringing up the issue, its importance, possible solutions, and desired outcome should be included. Simply stating a problem and expecting a leader to fix it is not helpful or constructive. Prioritize issues in order of importance and ensure adequate time on an agenda. These topics require the most amount of time to discuss.

[2] Why? Leaders should set the expectation that directs are accountable for their work and to effectively communicate.

Tips for Getting Started and Participating

How to Start with 1:1s
If you're unsure of how to start, be transparent and let your directs know. "Here's what I like us to do...Here's why....And we're all new to this, the first few sessions might need some refinement. We'll do four sessions, check in at the end of each, and see what we can improve."

Tips for Leaders

- **Keep the sessions short,** 30 minutes or less. This should help promote a concise focus.
- **Be clear** as to whether you expect all team members to schedule the 1:1s, or if you will be. Be consistent will all direct reports.
- **Recurring.** Try to have the meetings with your direct recur on the same day and time so that it's easier for all to be prepared and get into a regular cadence.
- **Frequent.** Ensure the meetings are scheduled frequently enough so that information and support can be provided in a timely manner.
- **Be explicit.** If there is something you want or need to know, explicitly state this. Don't expect people to know or guess. Be clear on what it is you need to know and why you need it.
- **Don't punish the messenger** and don't punish transparency or accountability. Focus on solutions.

Tips for Directs

- **Be prepared and concise.** Your manager is probably very busy.
- **Be proactive.** If you know something isn't going well or will be delayed, call it out.
- **Don't make excuses.** Provide facts and specifics for remediation or ideas for where you might need help.
- **Use the right communication channel.** Sending a multi-page summary of complex issues that includes images in a text message or IM is likely not an effective channel.
- **Provide info ahead of time** if you can, and summarize what it is you want them to know or what you plan to discuss.
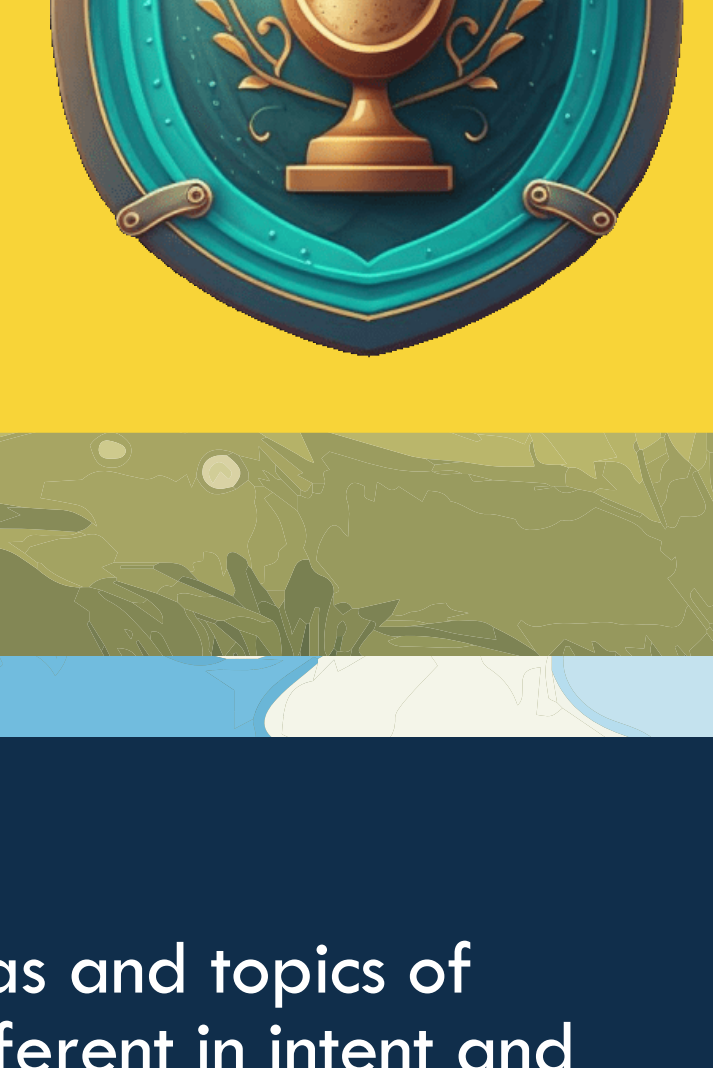
Conclusion

Hopefully you can tell based on the nature of the agendas and topics of discussion how a Development 1:1 and Status 1:1 are different in intent and purpose, and how the specificity and concise nature of the topics, combined with providing the appropriate amount of detail in each type of session can lead to ideal outcomes.

Remember that having the meetings is just the start. Decisions still need to be made, work accomplished, and accountability maintained. Clear intent and concise communication are foundational regardless of the type of 1:1.

Combined with a genuine and consistent investment in direct reports, leaders are well-positioned to set and maintain clear expectations and grow teams that can operate appropriately and independently while at the same time effectively providing information up to leadership in support of overall company goals and desired outcomes.

Example Agenda and Email

The following is a fictional example email and agenda for a Senior Manager in an IT organization providing an agenda to their VP for an upcoming Status 1:1.
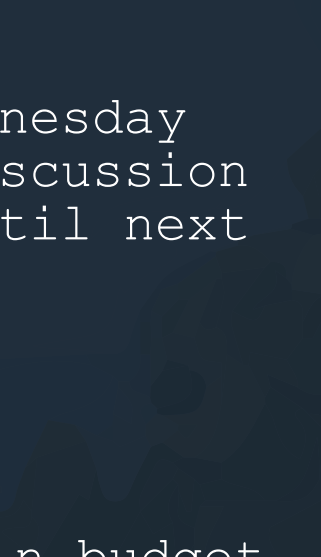
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"Hi Lucas, here's the agenda for our upcoming Status 1:1 on Wednesday
at 1:00 pm ET. We may not have enough time to get to all the discussion
items. They're still prioritized, and the last item can wait until next
time if needed.

(05 min) Updates
• Renewal for vulnerability scanning license completed and within budget.
• Onboarding for new hire scheduled for coming Monday, in time for project
  kickoff.
• Third-party risk report published to our team site as communicated.

(05 min) Decisions Needed
• DOW we requested from IAM/IGA vendor for our department requires signa-
  ture. I don't have signature authority yet. Can I send this to you for
  signature?
• I have two lead team members that should attend training for Project X.
  Both the training and travel estimates are within budget, and this was
  expected. Do I have your approval to complete their registration?
• The Marketing team would like to present the Q4 strategy to our team. We
  have 15 min available in our town hall. Ok for me get them on the agenda
  and let them know to whom to join?

(20) For Discussion
• Compliance Gap and Resourcing for New Opportunity.
  ▪ Sales is pursuing a new large customer, Est. $4 mil revenue annually.
  ▪ Early conversations with Sales and Legal show that we will be re-
    quired to meet a new audit and compliance requirement for this deal.
  ▪ With some consultant support we can meet the initial requirements.
  ▪ Will need to staff and maintain compliance annually.
  ▪ Estimated costs are $120k in consulting to meet, and then 2 FTE to
    maintain (attached.)
  ▪ Recommend funding from existing budget for consultant and budget for
    2 new hires in next year's budget.
  ▪ Need to make a decision by end of next week so that we can inform
    Sales and Legal.
• Hardware Refresh
  ▪ On-prem web servers are coming end-of-life in 6 months.
  ▪ We have the option to move to cloud and know how to migrate.
  ▪ Managed Services Vendor can support whether on-prem or cloud.
  ▪ Will be a 20% uplift in cost for solution, but will no longer need to
    support and maintain HW. Estimated savings on resource allocation and
    licensing attached.
  ▪ Ideally, we would be able to migrate these systems to cloud so that
    we can reprioritize limited resources. Overall cost savings due to
    reduced support and licensing.
• Additional User Licensing Needed
  ▪ Company revenue exceeded target last quarter. New hires across the
    company were also 40% higher than forecasted in order to meet Sales
    demand.
  ▪ We are projected to exceed user license count for our ITSM, Project
    Management, and Sales solution within 3 months.
  ▪ All applicable tools will permit us to exceed license count and do a
    true-up at year end.
  ▪ Expected true-up and additional license costs attached.
  ▪ Finance has already approved the overages given the increased reve-
    nue.
  ▪ Recommend we discuss options to:
    ▪ Detect license overruns sooner.
    ▪ Ensure there is proper budget at renewal.
    ▪ Negotiate better pricing given the increased license counts.
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