

The Rules

Rule 1: Be in the same room. Find a space to share that allows for focus and no interruptions. You can use phone or Skype if necessary to keep the appointment (or if working virtually).

Rule 2: Individual (not leader) owns the agenda. Individual creates it and distributes it based on the preference of the leader.

Rule 3: Never cancel without rescheduling.

Sample Agenda: 30 minutes

1. Review items. (20 minutes)
2. Leader: Anything to add/bring up? (5 minutes)
 Note: When starting one-on-ones, expect to spend 45-60 minutes for first 3-6 months. The other factor that makes these longer is only doing them once a month.
3. Review commitments. (5 minutes)

Guidelines: For the Individual

1. **Be prepared:** Sheet should be ready and distributed by an agreed upon time.
2. **Highlight successes, but focus on yellow/red items to discuss and either:** a) share your plan to fix and get input or b) ask for help. (Your goal is to use *a* almost all the time, and *b* occasionally.)
3. **Record commitments:** Record any action items coming out of the conversation and share them with leader after the meeting.
4. **Respect the time:** If something requires multiple people or a deeper dive, schedule another meeting to focus on and close out that item.
5. **This time is to help you:** Outcomes will follow your attitude.
6. **Follow up** on all commitments.

Guidelines: For the Leader

1. **Be present:** Shut off phone/computer. Eliminate things that will distract you.
2. **Don't Save BIG issues for this meeting:** If something happens during business (good or bad) that needs to be addressed with this person, just do it when it has to be done. Saving big things (especially negative) for the one-on-one is called "hijacking."
3. **Stuck or unsure?** Work hard to read between the lines. If the individual is uncertain, use questions to coach toward a solution: *What do you think you should do? How would you measure success? What do you need from me?* If they are truly stuck give them ideas and ask them to pick one, discuss it, and move on. Your goal: 3 asks for every one tell during your conversation. Keep a visual tally for yourself.
4. **Disagree/Discuss when it is necessary:** It is okay to disagree. You can win (you are the leader and/or owner), but not all the time.
5. **This time is to help you:** Outcomes will follow your attitude.
6. **Follow up** on all commitments.

For advanced leadership training – Great final questions: What one thing do I need to do more of? What is one thing I need to do less of? (This will give you feedback that will help you become a more effective leader. Record what you hear, and review it every couple of months and focus on making one development goal for yourself based on the feedback.)