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Leading Effective One-on-One Meetings

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Four Essentials of Effective Team Leadership

Commit to the basics. Do them well; do them consistently;
. . . and follow through

The Individual

- Respect and recognition
- Pride, motivation and morale
- Support and development
- Empower them to be their best

A one-on-one meeting maximizes your effectiveness at leading individuals:

- It says *'I care'*
- Learn about each other
- Clarify expectations
- Assess performance
- Support and develop
- Give guidance
- Recognize and celebrate success

The Plan

- Meets the needs for: clarity, confidence and control
- Prepare it with your team

The Team

- Encourage and value diversity
- Foster constructive relationships
- Encourage shared responsibility
- Celebrate success

Communication

- Transactional communication: what, how, when, where, who?
- Transformational communication: why?



Five Types of Meeting

Conversation for Possibility

A discussion to generate new ideas. The most creative and freely structured meeting type.

Conversation for Opportunity

This is about evaluating ideas and making decisions, so this is where you will need to deploy your persuasion skills to influence others.

Conversation for Action

This is the type of meeting that rolls its sleeves up and gets things done. It solves problems and, once it has a solution, this is where you will make plans, set deadlines, and allocate responsibilities.

Conversation for Relationships

These meetings are about building and strengthening relationships. Sometimes they achieve little else, but they are also about sharing knowledge and information. When we have a common understanding of reality, this strengthens rapport.

Conversation for Ritual

A meeting for the sake of having a meeting. Conversations for ritual get little done – not even developing relationships. People attend because they have to, knowing that it will waste their time. So, it should be either cancelled or re-established for a specific purpose.

The first four conversation types are valuable. And the different reasons to meet can all spawn conversations of each of these types.

What is important is to make a clear transition in the meeting, when the conversation type shifts.



Planning Your Meeting

Your planning needs to schedule:

- Date
- Time
- Place (balance privacy, formality, convenience)
- Layout
- Hospitality (Tea/coffee/water…)
- Time to prepare

Employee-focused One-on-ones

Best practice suggests that you should meet your team members frequently, to keep them fully engaged and motivated, recognize their performance and progress, and address any concerns they may have, before they become major.

So, how often, and for how long?

How often?

This depends on the number of people you have and their level of need. Ideally, fortnightly, but most managers aim for a monthly routine. If you cannot attend a scheduled one-on-one, make a point of rescheduling it as quickly as possible.

How long?

Aim for an hour. If you go for less than 45 minutes, you will never dive below the superficial issues and concerns. If you allow much more than an hour as a regular approach, you will find your conversations can ramble.

Preparation for your Meeting

Components

- Purpose (Which of the reasons to meet).
  Are you there to solve a problem, to catch up on a project progress, to review a staff member's performance and identify learning needs
- Outcomes (…and therefore what types of conversation)
  Be clear about what you want to achieve at the end – a solution, a revised project plan, a learning plan…
- Agenda (Prepare and share)
- Review previous meeting (and any agreed actions)
- Ensure schedule allows you to be on time



Preparing your Agenda

Keep it Simple

- Ideally one topic, but no more than three
- Lead with the outcome/s
- Conversations to meet each outcome
- Allow most of the time to hear from your team member
- Have open questions to prompt discussion
- Plan for around 50 mins of a 1hr meeting, or 40 mins of a 45 min meeting (to allow over-run)

Flexibility

- Be prepared to adapt to circumstances
- But try to avoid getting sucked into topical but low impact topics

An Agenda for Results

Meeting Title

Meeting Objectives

1. Objective 1
2. Objective 2
3. Objective 3

Facilitator/Chair: Name

Agenda

1. Item 1
2. Item 2
3. Item 3

Preparation

Reference any reading or other preparation that participants need to undertake



The Five Stages of a Meeting

Rapport Building / Ice Breaking

- Catch up
- Off-load
- FROGS*

Opening

- Context and purpose for meeting
- Outcomes/Objectives
- Agenda
- Ground rules

Conversation

Summary

Commitments and actions

* FROGS:

Friends

Relatives

Organizations

Geography

Social or Sport

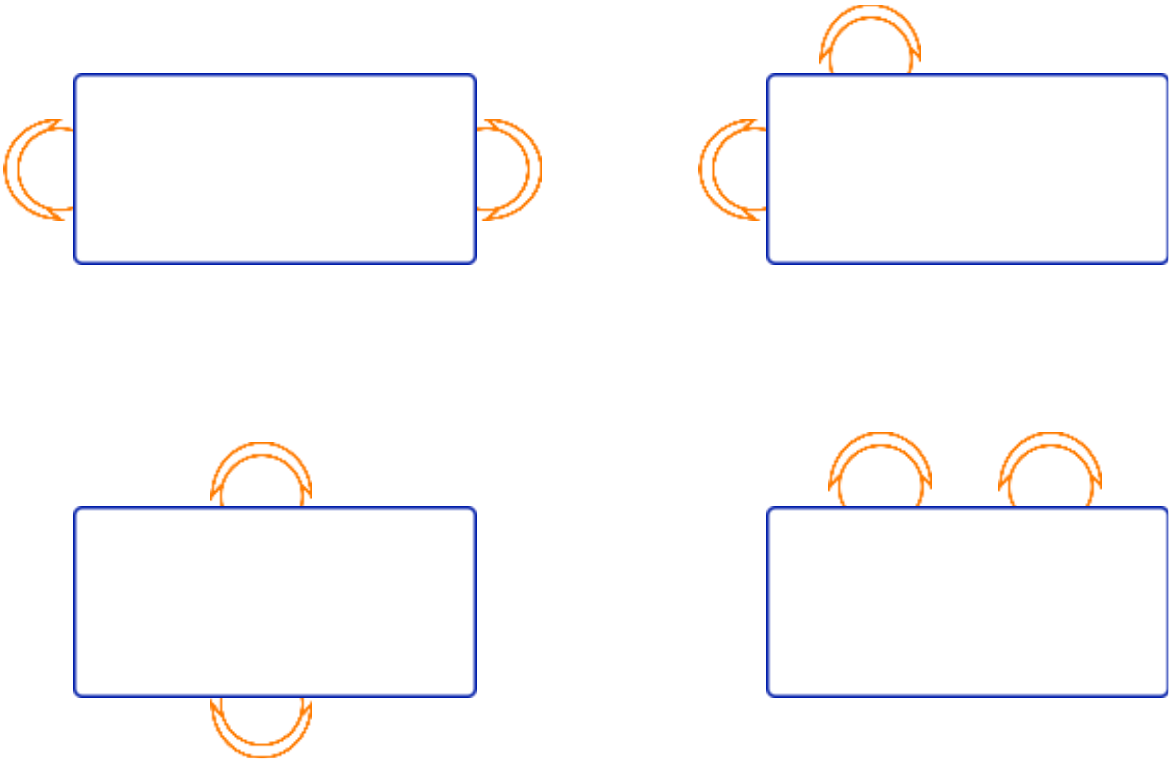


Meeting Room Layout

The Main Options

- Formal – table and chairs (most common)
- Semi-formal – chairs – no table (or low table)
- Standing (unlikely for anything but a short meeting)
- Comfy (soft chairs/sofas)
- Non-meeting room venues (café, hotel lobby)

Table and Chair Layouts





Rapport Building Skills

Small talk

Break the ice, put people at their ease.

Posture

Open, relaxed posture. Start to become aware of how you sit and stand, and if necessary ask for some feedback on how you come over. And be aware of the other person's posture too. If they seem withdrawn or anxious, think about how you can put people at their ease.

Eye contact

In most cultures, it is courteous to look people in the eye, especially when they are speaking. This is not a fixed stare, but a relaxed eye contact where you see the person, but your field of vision is also wide enough to see the space around them, so you are looking at the person in context. If you're not sure what about this, practice with someone you know well.

Acknowledgement

Acknowledge what someone has said. You may nod and repeat back some of their key words. Don't parrot the other person, just pick up on what you believe are their key points and reflect back to check your understanding

Matching

Match basic body postures and elements of the gestures and facial expressions.



Seven Basic Question Types

	Characteristics
Open	
Probing	
Multiple Choice	
Closed	
Hypothetical	
Multiple	
Leading	

Exercise: Create one example of each question type.



Listening Skills

Four levels

- Superficial Listening
- Conversational Listening
- Active Listening
- Deep Listening

How to Develop good quality active listening

- Intention
- Awareness
- Silence
- Responding
- Note-taking
- Noticing language (and gesture, expression, body language)



Staff-focused One-on-One Meetings

What we mean by this type of meeting

This is an informal meeting focused on your staff member. It is about them and their development and motivation. Therefore, it is not about you checking up on their progress on a specific task.

Think of it as a strategic focus on them, rather than a tactical focus on immediate performance. However, if recent events have a bearing on what they choose to discuss, that's fine

Typical Agenda

- Informal ice breaking to catch up
- Confirm expectations for the meeting
- Staff-member discusses topics of interest to them
  For example, development, opportunities, motivation, challenges
- You respond and widen the discussion
- Summarise key points – best if you can encourage them to do this and you endorse their comments
- Agree next steps and commitments

General Advice

- Keep the focus on what they want to cover, not what you want to talk about.
- Set regular cycle (typically monthly) and allow plenty of uninterrupted time (45 minutes minimum – ideally 1 hour).
- This meeting is for them, so ask them for their topics/agenda in advance, so they have a chance to think it through and you are alerted to anything you need to think about.
- Listen hard to what they say before trying to respond.
- Take good notes, so you can refer to them before the next meeting.
- Setting can be formal or semi-formal according to culture. Avoid making it too informal, or it will lose its link to the importance of the work.



Checkpoint or Status Meetings

What we mean by this type of meeting

This is a task focused meeting, that is part of the monitor and correct cycle. It is about risk management – for them, for you, and for your organization.

Typical Agenda

- Overview of context
- Where we got to last time
- Where we are now
- Issues, concerns problems
- Recognition of successes
- Work-plan from now to next checkpoint

General Advice

- Frequency dictated by level of risk: importance of work, complexity, team-member's capability and confidence, consequences of failure.
- Time allowed dictated by complexity of what's going on – shorter is better.
- Formal work setting – consider standing meetings for 15 mins or less.
- Keep it light and fast-paced – only focus in when you need to.
- Ensure you recognize and celebrate achievement, and keep the tome positive.
- A punitive tone will discourage honest reporting.



Informal Feedback Meetings

What we mean by this type of meeting

This meeting is about giving feedback on performance. It therefore has a developmental objective. But it is not a formal appraisal.

General Advice

- Invite the person to reflect first on how they have done.
- Be positive – focus on what they have done well. Be specific.
- Ask questions, to encourage your staff member to think through improvements they want to make.
- You may have suggestions to make or even instructions to give if performance hasn't been good enough. Make these in a constructive tone, and check understanding and agreement.
- Aim to finish a feedback meeting with something positive or encouraging.



Formal Appraisal Meetings

What we mean by this type of meeting

This meeting is often required by your organisation's personnel or HR procedures. Its purpose is assessing employee's performance, progress, and potential. Often the format and evaluation framework are set for you

Typical Agenda

Your organization will probably have a standard agenda. This may be detailed and rigid, or a flexible framework. Whichever it is, you must stick fairly closely to it, or risk disadvantaging your colleague. It is likely to contain:

- An overview of performance in the recent period.
- Your feedback to them.
- A discussion of where they are and how they are progressing in their career.
- Next steps for the colleague, and development needs and opportunities.
- There may be a goal setting element.
- You may include some advice, coaching, or mentoring component.

General Advice

- Adhere to your internal process.
- Prepare scrupulously well – gather your data and review it carefully.
- Plan how you will conduct the conversations – especially if they will be difficult.
- Anticipate objections to your assessment.
- Plan out plenty of questions to ask.
- Be prepared to listen carefully if they offer a new interpretation of the data – and be prepared to re-assess your evaluation accordingly.
- Wherever possible, keep the tone future focused.
- Avoid the trap of inferring capabilities or lack of them. There is always a limitation to what the evidence can show.
- Ensure they have plenty of notice of the meeting and what it will cover.
- Take thorough notes.



Difficult Conversations

What we mean by 'difficult' conversations

- High emotional charge
- Perceived differences of opinion
- Importance / consequences

Examples

- Reprimand
- Re-locating
- Denying promotion
- Bad news

Typical Agenda

- This will depend on the level of confidentiality around the issue, as to how much (if any) information you can include in advance.
- These will usually be a one-topic meeting.

General Advice

- Greet the person and establish rapport.
- Then give the news, don't spend too long building up to it
- Consider your wording carefully – it can help to prepare some wording in advance, but also adjust your wording as needed on the day. You don't want to sound like you are trotting out a sound-byte.
- Allow them time to process your message – give them silence.
- Allow time for an emotional response and be respectful of their feelings.
- Listen, and respond to their questions and concerns.



Coaching Meetings

What we mean by this type of meeting

This meeting is aimed at either developing your team member's performance or capabilities, or helping them resolve a challenge.

The principle is for you to help them to find their own solutions. It is not your role to provide answers.

Typical Agenda

- Agree the topic for the conversation – the development need or challenge they want to work on.
- Discuss the goal they want to set themselves.
- Explore the current situation. Ask probing questions so they can access finer details of awareness about their situation.
- Ask them for options for how they can achieve their goal. Keep asking for more options and note them down.
- Help them to evaluate the options they have suggested. Ask questions that help them see the advantages and risks attached to each.
- Get them to commit to one or more options, and to put together a plan for how and when they will execute, and the resources and help they may need.
- Confirm their commitment to the plan.

General Advice

Your primary skills are:

- Asking good questions that stimulate a deeper awareness of the situation and the options available.
- Listening hard, so your next question will be on-point.
- Remaining silent to allow them to find more answers and more difficult answers for themselves.
- Helping them to see that their perceived limitations are just that – perceptions. The reality of their potential is far wider.

Trust in two things:

- The coaching process works.
- Your colleague can find good solutions to their development needs or challenges.



Mentoring Meetings

What we mean by this type of meeting

A mentoring relationship is primarily about helping staff to develop themselves and their careers.

A mentor may be a manager, or you may be mentoring someone whom you don't manage, perhaps they are a more junior staff member with potential.

Your role is to provide a space for them to reflect on their work and on their personal development. You may also have a role in offering advice or guidance, or putting them in touch with others in your network who could help them.

Typical Agenda

- At the first mentoring meeting, you will want to talk about how the mentoring relationship will work. Is it just a one-off conversation, or will you meet on a regular or as and when basis?
- Discuss what you want from the relationship. If you are the mentee, do you want a place where you can go and reflect on your career, or are you looking for specific advice and guidance?
- As the mentor, also be clear about what you can and cannot bring to the relationship.
- At subsequent meetings, you might put together an agenda that includes:
    1. Catch up on progress since the last meeting
    2. Topic(s) for discussion.
    3. Current situation
    4. Desired goals
    5. Options for moving forward
    6. Actions

General Advice

- As a mentor, you are there to support the mentee, and allow them to lead the agenda.
- You will be using core coaching skills of listening and questions. You may also have specific advice or guidance to give where appropriate.



Giving a Reprimand

What we mean by this type of meeting

People do things wrong. Sometimes it is through carelessness, complacency, or even negligence. In these cases, you may consider a reprimand is appropriate.

Typical Agenda

- Confirm the facts. Set out what you have observed or had reported to you. Invite the other person to confirm or correct your facts. Keep it simple.
- Clearly state what they did wrong.
- Say how you feel about it.
- Then stay silent and let it sink in.
- Allow a response and accept it. Only challenge it if your evidence suggests they are compounding the problem, by fooling themselves.
- Close the meeting by emphasizing how much you value the other person and re-iterate your support for them.
- Stop.

General Advice

- Convene this meeting as soon as possible after the incident.
- Be super-clear about what they did wrong.
- Don't criticize them – it is their behavior that is the problem, is stick to that.
- Keep it calm.
- Be consistent and fair – treat everyone on your team the same.
- Keep the meeting very short – no need to rub their nose in it.



Final Summary of Key Points

Key insights for conducting good one-on-ones

- Commit to them and their value.
- Prepare well.
- Listen uncritically to the other person – put yourself and your own opinions out of the way, until you have heard them out.
- If you approach the meeting tired at the end of the day, or as a chore and obligation, or worst of all, as a filler between 'real work'… you will fail.
- So, above all… Care.
  Care about the other person.
  Care about their career and their personal professional development, and care about each meeting.

Good luck



Facilitator Profile: Mike Clayton

Mike Clayton ... is an experienced trainer, speaker, facilitator and performance coach, with a background in project and change management, and management consultancy.

Mike's record of successful innovation and his real passion for creating peak performance in individuals, teams, and organizations ensure depth, excitement and high-quality outcomes to his work. Mike's programs create profound and lasting change.

Formerly a Senior Manager at Deloitte Consulting, with 13 years' international consulting and project management experience, Mike has a PhD, is an NLP Master Practitioner, and is affiliated to the Chartered Institute of Personnel and Development.

An Exceptional Track Record of Success

As a consultant Mike specialized in the delivery and integration of complex change in a diverse range of private, public and third sector organizations.

Working in and leading a wide variety of highly successful teams has given Mike valuable insights into organizational change, team-working, and leadership. He presents a personal point of view and real tools from 13 years of consulting and management experience.

Mike is a former governor of a primary and of a secondary school, trustee of a national children's charity, director of the charity Theatre Exchange, and treasurer of a London housing co-operative. Mike is a regular contributor to Training Journal, Business Uncovered, The Best You, The Treasurer, and Project (the journal of The Association for Project Management).

Online **PM** Courses
Build Your Project Career

Mike's latest project launched, in June 2016. Online**PM**Courses.com offers video-based project management training, and a wide range of free project management resources.

You can get a FREE extended glossary: *'Decode the Jargon of Project Management'* from the website.



I wish you even greater success with your one-on-one meetings

Mike

Mike is author of thirteen print books, including
Brilliant Project Leader**, **The Influence Agenda, Handling Resistance** **How to Speak so People Listen** and **Smart to Wise



And, most recently:



Powerhouse (n):
Somebody who is full of energy, highly effective, and therefore very productive.

For free downloadable resources: www.**Mike**Clayton.co.uk

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