

One-to-One Meetings – Guidance for Managers

Introduction

This guidance does not form part of an HR policy but is designed to give guidance on good management practice.

It is well recognised best practice that regular one-to-one meetings are a key element of effective line management. Making time for regular, effective supervision has benefits for the employee as well as the line manager. One-to-one meetings provide an opportunity to clarify expectations and what needs to be done, as well as making sure issues are discussed in a timely manner. They can support employee motivation, development, performance and well-being.

One-to-one meetings are an opportunity to:

- **check progress** against objectives and deadlines
- **discuss adjustment of objectives/targets**, deadlines and goals where necessary
- **highlight concerns** in a timely way
- carry out **joint problem solving, coaching** or encouragement
- **raise issues over performance or conduct** in a timely way
- **highlight performance issues** so there are no surprises at the annual appraisal
- **discuss learning and development** needs and support
- **discuss any work or personal issues, stressors, relationship or other concerns** that may be impacting on well-being, attendance or performance and consider how best the employee can be supported
- have a **confidential and protected time** to discuss career aspirations and wider organisational issues
- **recognise achievements** and offer praise in a timely way
- **check reasonable adjustments** for disabled colleagues remain in place

Location

Ideally meetings should be face-to-face. However, suitable alternatives are video conferencing or telephone. Managers and their direct reports may not be co-located and suitable alternatives must be explored to facilitate one-to-one meetings. **Care should be taken to ensure the discussion takes place in a confidential setting.**

Length and Frequency

The length of time for a one-to-one can depend on the type of role the employee undertakes, the frequency of day-to-day catch ups at the desk and the topics to be discussed. As a general guide, 45 minutes to an hour should be scheduled. It's a good idea to diarise meetings throughout the year and make them protected time so they aren't cancelled.

There is no hard and fast rule about how often these meetings should be held. Some managers find it helpful to hold a one-to-one meeting every 4 weeks.

However, a number of factors may affect the frequency of meetings:

- Length of service – it's appropriate to meet more frequently during induction or if they are new to the role
- Concerns about performance or conduct
- When new projects or responsibilities are required
- When there is likely to be a need for extra reassurance and support, for example during a time of change

Taking notes

There are a range of potential approaches such as recording action points only, handwritten notes, typing up detailed notes and ensuring these are signed/acknowledged by both parties or an exchange of emails with a summary and agreed actions.

The approach should be proportionate. You don't want to spend all your time writing up notes of one-to-one meetings. Equally an employee might infer how much you value their contribution, based on the effort the line manager puts into writing up notes.

Therefore, you should bear in mind the following:

- After a one-to-one meeting, it's important both parties are clear about the discussion and **have the same understanding** of any expectations set, actions needed and follow up
- Recording feedback – positive and developmental – can be motivational and also makes clear expectations going forward
- The notes will provide evidence to help preparation for annual appraisals as well as monitoring against progress with appraisal objectives
- In handing over to a new line manager, notes provide continuity and understanding and avoids employees having to unnecessarily revisit issues with new line managers

- If there is a need to move towards a formal performance management process, one-to-one notes provide evidence of feedback given, goals set, support offered and actions agreed at an informal stage
- Notes typed after the meeting should reflect what was discussed and not what you *would have liked to have said!* You can relay anything missed in a covering email or phone call
- The line manager or the employee can take/write up notes, but it's important any messages from the line manager about performance issues are clear and accurate
- Typing up notes at the meeting may save time, but can detract from the quality of conversation and the line manager's ability to get visual clues about how the employee is feeling
- Share a copy of the notes with the employee for their records as they may wish to comment

Practical hints and tips for one-to-one meetings

- Prepare in advance so you and your staff member find the experience meaningful and useful
- Book a time and place where you will not be interrupted. Avoid cancelling meetings as much as possible
- Where possible adapt your approach to the employee's preferred style. Start by focussing on what's important to them, eg building and maintaining an effective relationship, recognising achievement, and so on
- Have an agenda in mind – formal or otherwise but adapt as necessary
- Consider starting with the employee's 'agenda'. If they have something on their mind, they may be more receptive to feedback if they've been listened to first
- Maintain a balance of positive and developmental feedback, so the member of staff feels valued, stretched and has areas they can work on
- Discuss 'what' they are doing, as well as 'how' they are doing it
- One-to-ones are about listening as well as speaking. Try to encourage an 80-20 balance so that the employee does most of the talking. Managers may wish to give praise where appropriate or refer to examples.
- Encourage the staff member to talk openly about their work and how they are feeling
- Ask open questions and avoid making assumptions about the staff member's needs and views
- Consider any reasonable adjustments for disability, eg meeting length, communication support, accessibility.

Topics to cover

This will be led by the particular circumstances.

Common topics are:

- General 'check-in' about well-being
- General review of workload/balance
- 'Check-in' about any specific issues, such as changes or difficult situations that have arisen
- Check any reasonable adjustments for disability are working effectively, discuss remedial action where needed
- Progress against objectives/targets
- Check that support and direction are sufficient
- Reflection on what has gone well/not so well, since last one-to-one
- Learning and development in current role
- Review of any recent development opportunities experienced
- Career development
- Organisational information – clarification that messages have been received/understood

Please also see **Template for One-to-One Meetings**