



# FP Weekly Checklist: The Best Way to Have 1:1 Meetings with Your Team Members

Insights

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FP Weekly members receive a practical and cutting-edge checklist of issues to consider, action steps to take, and goals to accomplish to ensure you remain on the top of your game when it comes to workplace relations and employment law compliance. This week we are republishing a checklist of items to consider when overseeing one-on-one meetings with team members – an especially timely topic given how many organizations are preparing for annual evaluations this time of year.

## Why 1:1 Meetings?

One-on-one (or 1:1) meetings are an essential tool to make sure your organization is operating smoothly and are a crucial part of an effective human resources strategy. They are regularly scheduled meetings – perhaps weekly, perhaps monthly, or at some other regular cadence – between supervisors and team members. The sky's the limit when it comes to setting an appropriate agenda for them, and each relationship warrants its own individual meeting style.

These meetings can be a win-win for your organization. Your supervisors get to test out their managerial skills in low-stress conditions and help build trust with their team members. The employees who are meeting with their supervisors will feel more valued and heard through these regular channels. Through these regular check-ins problems can be addressed before they fester and solutions can be achieved to keep your team's work flowing effectively. As a result, productivity and effectiveness should increase and HR problems should decrease.

\_\_\_\_\_ Decide on the proper interval between meetings with each team member. Some relationships might warrant frequent meetings (weekly is most common) while others can withstand several weeks between regular check-ins. In setting the interval, consider how much tenure the team member has in the organization, how new (or experienced) they are in their role, how much training they need to get their work done, the personalities at play (whether they need more regular care and feeding than other team members, for example), and other similar factors.

\_\_\_\_\_ Keep the appointments on your calendar sacred. If a true emergency develops, reschedule the meeting later (or earlier) in the day or a day or two in the future, but

don't get in the habit of canceling or missing the meetings. This can lead to resentment and reduced commitment to the organization.

\_\_\_\_\_ Remain consistent in meeting with team members. Although the time interval for meetings may vary from team member to team member based on their tenure and individual needs, be aware of the perception that some team members may be receiving more favorable – or less favorable – treatment in how often supervisors meet with them.

\_\_\_\_\_ Develop a rough agenda of a few items you need to discuss – but be flexible. Always provide some extra time in the meeting for an open forum to allow your employee to bring questions, concerns, or new topics to the table.

\_\_\_\_\_ Keep your planned agenda limited so you don't let things get bogged down. This isn't the time to overwhelm your team member with new assignments or a long dissertation about big-picture company issues. Most 1:1s are best if they are 30 minutes or less. You will start to lose your team member's attention if you go much longer.

\_\_\_\_\_ Switch things up to keep it fresh. Your meetings don't always have to take place in your office behind your desk and an office chair or over a Zoom call. Perhaps you can meet out for lunch, or at a coffee shop, or schedule a walking meeting.

\_\_\_\_\_ Make sure you provide your team member with your undivided attention. Don't respond to calls or texts or messages during the meeting time. Take steps to protect the space and let them know you are committed to their issues.

\_\_\_\_\_ Don't do all of the talking. There's no exact percentage that's right for a 1:1, but you need to ask serious questions of yourself if you are doing 75% of the talking. Are you asking enough questions? Have you done enough preparation ahead of time that you feel comfortable engaging your employee about topics important to them?

\_\_\_\_\_ Approach performance management issues in a direct but open manner. Your one-on-ones shouldn't turn into disciplinary meetings where you mete out verbal or written warnings. For a variety of reasons, such discipline should be held in conjunction with HR and perhaps with another manager present – not during a one-on-one. Your employees will not look forward to your 1:1s if they are fearful they might get disciplined at the meetings.

\_\_\_\_\_ But that doesn't mean you can't bring up challenges to overcome or projects that have missed the mark during your meetings. If you go this route, make sure you approach such subjects with a constructive mindset and try to identify the barriers that led to the

problem so they can be fixed as opposed to assigning blame. Quickly pivot the meeting to how you can support them in overcoming these challenges.

\_\_\_\_\_ All of these rules might be different if you operate in a unionized environment – or in a workplace in which unions are a topic of discussion. Work with HR to make sure you understand what you can and can't bring up during one-on-ones, especially given the shifting rules on "captive" meetings and the Weingarten doctrine (if you don't know what these things mean, make sure you become well-versed by HR or Legal before you launch into a 1:1 meeting).

\_\_\_\_\_ Start by connecting with them on a human level. Ask how they are doing and take sincere interest in their response.

\_\_\_\_\_ Ask how things have been going since your last meeting. Specifically ask whether you are providing sufficient guidance and direction to enable them to do their day-to-day job.

\_\_\_\_\_ Check in with your team member on their job satisfaction. Are there new skills or tasks they want to take on? Are there new responsibilities they want to add (or existing ones they want to shed)? Are they feeling empowered?

\_\_\_\_\_ Determine whether any roadblocks to success exist that you could assist with.

\_\_\_\_\_ Ask if they have any suggestions for improving workflow or their work process.

\_\_\_\_\_ Follow-up your 1:1 with a quick email summarizing items you have covered and laying out specific and concrete action items that you and/or your team member will take.

\_\_\_\_\_ If you discuss problems to be solved or challenges to be overcome, make sure you note them in your email – these could be helpful later on if the problems don't resolve and you need to take the issue to the next level with HR.

\_\_\_\_\_ Conversely, if you promise your team member you will address a problem they are having but don't follow up on it, you will lose their trust and could lose them altogether.

\_\_\_\_\_ And closing the cycle, make sure to prepare for your 1:1 meeting before it begins – if even for just a few minutes. Review the last few recap emails to remind you of what you and your team member talked about at the very least. You may even ask your direct report to provide you a quick email in advance with any topics they want to follow up on to aid you in your preparation.

## Conclusion

We will continue to provide weekly checklists to assist employers in their workplace law compliance, so make sure you are subscribed to Fisher Phillips' Insight system to keep up with the most up-to-date information. Please contact your Fisher Phillips attorney or the authors of this Insight.

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