FREE PACK · INSIGHTS

# One-to-one agenda template

A seven-part agenda with their items first, a question bank and what to record.

| Name | Manager | Date | Next one-to-one |
|---|---|---|---|
| | | | |

**1. Check-in**

*How are things, really? Anything outside work affecting work?*

**2. Their items first**

## 3. Progress on priorities

| Priority | Where it is | Help needed? |
|---|---|---|
| | | |
| | | |
| | | |

**4. Obstacles and support**

**5. Feedback to them**

**5. Feedback to me**

**6. Development**

*Their current stretch; anything to try before next time.*

## 7. Actions

| Action | Who | By when |
|---|---|---|
| | | |
| | | |
| | | |

## Questions for each part

### Check-in

- How are you doing, on a scale of 1 to 10?
- What has been the best part of the last fortnight?
- What has been the hardest part?

### Their items

- What's on your mind?
- What would be most useful to talk about today?

### Priorities

- What has moved since we last talked?
- What is at risk of slipping?
- What could you drop?

### Obstacles

- What is getting in your way?
- What can I do to help?
- Who else could help?

### Feedback

- What is one thing I could do differently that would help you?
- What would you like more feedback on?

### Development

- What have you learned recently?
- What would you like to be able to do in six months?

## What to record

- Actions, owners and dates. Decisions made. Anything you have each committed to.
- Keep notes short and factual, and share them. Write them as if the person will read them; they can usually ask to.
- Leave out opinions about their character, health diagnoses and gossip.

We suggest 30 minutes every week or fortnight, moved rather than cancelled. Template by great{with}talent.

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# Does any of this sound familiar?

The organisations we work with rarely come to us asking for a survey. They come with something that is costing them money, time or people. These are the ones we hear most often.

## MAKING MONEY

**"We hire well on paper and still get it wrong in the role."**
Personality, leadership and competency assessment matched to the job, so interviews test what matters and offers go to people who will perform. (FindingPotential)

**"Our best people leave and we only find out why afterwards."**
Exit intelligence in the leaver's final weeks: what was avoidable, who would come back, and what to change first. (LastOpinion)

**"Leaders get feedback once a year and nothing changes."**
Forward-looking 360 feedback that lands as development rather than judgement, with the actions built in. (FeedForward)

## SAVING MONEY

**"Too many new starters are gone inside a year."**
New-starter surveys at the points the first-year leak opens, so you act at three months instead of reading about it at exit. (OnBoarder)

**"References take weeks and tell us nothing."**
Automated referencing with questions that predict, most returned within 48 hours. (ReferenceExpert)

**"We run an engagement survey and the results sit in a drawer."**
Engagement reporting down to team level in plain English, with the three moves each team's own people chose. (WinningFormula)

## SOLVING PROBLEMS

**"The board wants evidence on culture, conduct and speaking up."**
A confidential always-on channel and a harassment-prevention audit that give you the evidence before a regulator asks for it. (SafeSpace)

**"We publish an inclusion statement and cannot show whether it is true."**
Inclusion measured at every stage from hire to exit, so you can see where the experience differs and act on it. (ED&I)

**"We have the data and cannot turn it into a decision."**
Twenty years of UK benchmark data and analysts who turn results into a board paper, not a dashboard. (Workforce intelligence)

## Who we are

great{with}talent is a UK workforce-intelligence consultancy, founded in 2003. We help organisations hire better, keep people longer, improve leadership, strengthen inclusion and reduce workplace risk, with a connected set of tools that turn employee data into clear, fast action across the whole employee lifecycle. Independent, GDPR-compliant and Cyber Essentials certified, hosted on Microsoft Azure.

**Not on the list?** It will not always be. If you are working on something you think we might be able to help with, drop us a note describing what you are trying to do and we will come back to you.

**On the list or not, let's talk.**

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