



One-On-One Monthly Reviews

(Please refer to the Instruction Sheet on page 2)

Employee:

Manager:

Date:

Employee Wins for the Month *(what have you achieved that you are really proud of)*

Employee Losses for the Month *(we all make decisions that don't turn out as expected, please give some examples):*

Do you feel that you are fulfilling your primary role expectations *(if not, how can your manager provide assistance?):*

Is your manager providing you with the direction, leadership and coaching you expect and need?

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Next Meeting is scheduled for: **at** **am/pm**





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Monthly One-On-One Instruction Sheet

WHY?

- One-On-Ones are a very important part of every manager's responsibility to their team
- Assist managers to monitor the wellness of their direct reports and be able to provide proactive assistance and guidance
- Assist managers to be fully informed of their team's achievements and failures and also help turn negatives into positives
- All employees want their managers to demonstrate leadership and for them to provide their direct reports with a clear picture of their expectations

WHEN?

- Once a month for 15 minutes
- Should be a scheduled meeting (ie the third Thursday of each month at ??:??pm)
- Must be viewed as a priority, One-On-Ones should never be cancelled and only postponed as a last resort

HOW?

- Either in an office/meeting room or other venue such as a coffee shop
- Each direct report is requested to complete all areas prior to the One-On-One
 - **“Wins for the Month”** can be work and/or personal achievements. The manager should help celebrate these wins and provide encouragement for future wins.
 - **“Losses for the Month”** can be work and/or personal losses. With work losses your role is to help the employee understand where they went wrong and agree on future processes to ensure that the same mistake is not made again. It does not mean that you do not hold the employee accountable and challenge their actions but you must do so objectively and un-emotively. For personal losses provide appropriate support and reassurance.
 - **“Primary Role Expectations”**, in this area you are ascertaining whether there is a clear understanding between your expectations and your direct report's expectations of their role. It is also an opportunity to ensure that they have the resources they need to fulfil their role and deliver the desired outcomes.
 - **“Direction, Leadership and Coaching”**, in this area you are discovering what type of leadership style your individual direct reports prefer. Your role as manager is to manage each employee how they need to be managed to elicit the highest level of engagement and productivity, you cannot manage all of your direct reports the same way.

