

# One to Ones



# What is a One To One?

Research shows that regular reviews, ongoing feedback and continued focus on development improve employee performance. And, with a regular one on one meeting, both parties will be able to worry a lot less about any big surprises when performance review meetings are held.

121s show a very real commitment from the manager to each of their staff members. This commitment has to be maintained so that 121s become part of the management routine. They should hardly ever be missed. 121s have a major impact on organisational culture when they are adopted throughout the organisation as they show a real commitment to people and performance.

121s provide the foundation on which managers and their employees can build a genuine and powerful working relationship that provide the foundation for high performance.

They provide the employee with the opportunity to bring to their manager's attention where they need help, support or permission to act. Providing employees with this opportunity in a structured way will dramatically reduce the time that managers spend reacting to ad hoc requests.

They give managers the chance to talk about issues that have occurred over the course of the month that may impact on the staff member – either because of changing priorities in the business or because of some aspect of their work.

Managers have the chance to talk on a monthly basis about the medium and longer term future. What training and development does the employee need to develop their career? What projects and opportunities might be on the horizon that the report may be interested in working on?

121s provide the foundation that allows manager's to make the transition from fire fighting to genuinely managing and developing performance.

# Why conduct 121s?

# Effective One To Ones:

Although it's a nice idea to think you can catch up with your staff members on the fly, that's harder to do in reality. By making a commitment to a schedule, both parties will better prepare and take the meeting more seriously. This is often the prime time for work to be discussed and advanced, so this time on the front end saves you dearly on the back end.

It's natural that other work may come up that causes you to reschedule, but beware. Rescheduling repeatedly sends the message that the employee is the most expendable action item on the schedule.

Try to stick with the meetings and have cancellations be the exception. Freedom 121s should be conducted on a monthly basis, ideally at the start of a month.

# Have A Schedule And Stick To It

Preparations for a 121 meeting should ideally start around 1 week before the session, with the employee reviewing their previous months performance and reflecting on their wins, learns and focus areas for the new month. Your employee should be provided with a blank 121 document and asked to fill out the following sections prior to their 121 meeting:

**What has gone well this month?:**

Employees should be encouraged to start by looking at their achievements over the month and the areas where they succeeded regardless of whether this was an objective or not.

**What do you feel needs further development?:**

This section encourages employees to be candid and honest about where they feel more work could be done to improve performance.

**Performance against last months objectives: What have you ACHIEVED?  
AND**

**Performance against last months objectives: What have you NOT  
ACHIEVED and WHY?:**

Now we drill down with regard to objectives set in the previous 121 and the employees perception of these.

**Performance against key KPIs :**

Lastly, the employee should enter their performance against their KPIs and add any supporting comments they feel will explain these figures.

A close-up photograph of a person's hands writing on a document. The person is wearing a blue button-down shirt. The background is blurred, showing what appears to be an office setting. The text 'Preparing for a 121: Employee' is overlaid on the right side of the image in a large, bold, teal font.

# Preparing for a 121: Employee

## Monthly One to One

Staff Member	Joe Bloggs	Supervisor	Jane Doe
Date	01/01/2017	Period Under Review	December 2016

### What has gone well this month?

I have improved my availability percentage and it have positively affected my sales which is great, I had my highest pay out in December.

I've enjoyed getting some coaching from my Deputy Manager to help with performance.

### What do you feel needs further development?

Some of my targets were high and I failed to hit them and I failed an audit which impacted my bonus.

### Performance against last months objectives: What have you ACHIEVED?

I improved my availability which was my main target.

I kept my break times and off call activity down using the techniques I was shown which helped.

I have set a new personal best for pay-outs which was another personal objective.

### Performance against last months objectives: What have you NOT ACHIEVED and WHY?

My conversion and completion targets were off. I think I need more help with objection handling to convert more leads.

## Performance against key KPIs

KPI	Target	Actual	Divergence	Staff members comments
Availability	80%	92%	+12%	I know how to keep this high and maintain this so ill set a target for the next month based on my new personal best.
Completion	75%	70%	-5%	I think that more objection handling would help me improve this.
Conversion	60%	56%	-4%	I think that more objection handling would help me improve this.
Call Quality	90%	91%	+1%	
Call Compliance	No MAJOR fails	No Fails	N/A	
Audits	5 Passes	4 Passes	-1	I failed because I didn't follow a script which is totally my fault, and is an easy fix!

A silver laptop is open on a wooden desk. To the left of the laptop is a white notebook with a black pen resting on it. The background shows a wooden chair and a wooden table.

# Preparing for a 121: Manager

Once an employee has completed their sections of the 121 document you should collect this from them for review prior to the 121 meeting.

Whilst you will have drawn conclusions and perhaps even planned out actions prior to reviewing the 121 form, it is important to understand the employees perception of their own performance as they may have highlighted either a lack of understanding around achievement of targets/ KPIs or perhaps have raised issues affecting performance that you were unaware of.

Once you have reviewed the document, you may add comments in the appropriate section if necessary. Once completed, you are ready to conduct your 121 meeting.



## Supporting Comments

### Staff Member Comments

Like I said I think I've done well on some stats but need help with others.

### Supervisor Comments

You've done fantastically this month to improve your availability and it's reflected in your pay-outs which is great.

You've also made great progress completing your regulatory modules which you'd forgotten about!

I agree that you are off the pace with your sales and we need to work on that. Whilst objection handling is key to closing sales we need to ensure we are promoting these first and foremost and if we add additional dialogue that it's used consistently.

I'd like to see what we can do to improve your numbers so that next month we're looking at all green stats!

# Effective One To Ones: Pre Position

With one to ones its an excellent time saving and agenda setting tool to talk to your staff about the structure your meetings will take either at the start of the meeting, or better yet, before the meeting occurs.

Let them know: it's partly about what you need to discuss, and also about what your employee wants to raise. It shouldn't be just a one-way delegation of tasks.

Good one-on-ones are a conversation, and for that to be successful you need to be receptive.

It's also important to leave time to discuss open issues. This is a great chance to cover those less urgent items, like a promotion path or difficulty with a colleague, that get in the way of productivity and retention. Better to know early, as it may be a problem that's easily resolved, and can give you insight into ways to keep your team more productive.

A good structure for a 45-minute 121 meeting is:

**15 Minutes:** How has the month gone in your staff members opinion? What successes were there? What didn't go as well? Don't be afraid to direct staff towards the issues you want to discuss specifically by probing, but ensure you let the other person talk (remember the ideal ratio of 80/20).

**15 Minutes:** What you need to raise with your employee, delegate, or provide feedback on? This is your time to review the previous month. KPIs and metrics should be used if you have them, just like observational feedback, ensure you can evidence your views.

**10 Minutes:** Just like you would during observational feedback, you need to plan actions that address any development areas you've just evidenced. Start with improvements in the staff members current role and ensure all performance deficits are addressed before moving on to progression if this is appropriate.

**5 Minutes:** State accountabilities, make sure your staff member is clear on their next steps and make a plan for follow up.

As a side benefit, you'll find that when you follow this type of format, it becomes easier to provide constructive feedback and to address issues before they become big problems as there's a space set aside for it. It also supports proactivity and strategic thinking because everyone knows that they are expected to come to the table ready to share.

# Effective One To Ones: Structure

### Specific

What do you want / does the staff member want to do? Metrics should support this. How, How Much. By When?

*E.g. I want to improve my NPS score to be above the team's average.*

### Measurable

How will you, as a TL, know when the goal has been achieved? What does the staff member need to have achieved?

*E.g. I will need to improve by 2.3*

### Achievable and Realistic

Is the goal achievable? Is this in line with the business needs/ goals? Can the staff member reasonably be expected to hit the target/ goal?

*E.g. I know this is achievable as I have previously attained this score.*

### Time Bound

By what date should we reassess these goals and the achievement against them?

*E.g. By the end of the month I will have achieved this goal.*

### Engaging and Reviewed

What are you going to do as a TL to ensure that the staff member stays the course? What will keep them going?

*E.g. I will look at how this staff member achieved their goal and build a development plan to support any other staff members in the same way.*

# The SMART Model: For Building Robust Objectives

## This month's objectives

Goal	Action(s)	Deadline	Support
<b>Improve Completion and Conversion of leads by 5% each</b>	Staff Member: Joe will record his 'wins and losses' with regards to sales on a daily basis and submit at EOD to me, we will discuss methods of overcoming sales objections.  Joe will start to craft objection handling dialogue off the back of my feedback, check this with me and then commit to implementing this.	End of Month	Coaching and Supervisor Support
	Supervisor: I will provide 45 minutes of coaching on Objection Handling through my Deputy to support Joe. Joe will need to commit to 5 new best practice habits off the back of the session, which will be recorded on his coaching document and checked for during audits. Deadline for this 07/01/2017  From 07/01/2017 I will conduct 3 additional audits focusing on Joes sales techniques and checking for implementation of his dialogue and new 5 actions.		
<b>Maintain new Availability at 92%</b>	Staff Member: Continue to follow the actions that got you here and if availability drops, flag this with me to check for reasons why.  Keep timing your breaks using the stopwatch on your desktop.	Ongoing	N/A
	Supervisor: I will check and update you with your figure weekly at COB Fridays.		
<b>No audit fails regarding scripted elements.</b>	Staff Member: Joe will practice the scripted elements of his call with me as roleplays.	1 <sup>st</sup> Audit conducted	Roleplays
	Supervisor: N/A		

Signed Staff Member

Signed Supervisor

Date

# Effective One To Ones: Follow Up

As with any good meeting, it should wrap with accountabilities and a path for follow up. We all know it's easy to listen and absorb ideas when you're in the moment, and then to forget them when your attention is inevitably diverted.

Make sure to schedule the last few minutes of the meeting for each of you to go through and say what you're committing to and by when.

For best results this should also be followed up with an email from your staff member to you, restating what's supposed to happen. Depending on the project, it also may be useful to set up a milestone to update each other.

Lastly, once finalised, your completed 121 document should be uploaded to PeopleHR to be signed by the staff member.

# Key Learns



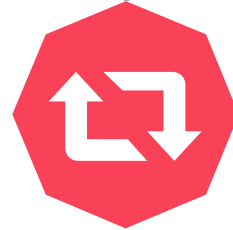
## **Staff should be involved in the 121 at each step of the process**

The more a staff member feels they are in control of their own development, the more they will buy into what they need to do, and the more likely they are to implement and achieve actions.



## **Objectives set in a 121 should address identified shortfalls**

Where there are performance shortfalls, 121 objectives should aim to address these using SMART objectives and measurable targets.



## **Follow up keeps 121s on track**

Staged follow up to ensure the 121s message has landed is critical, as is a commitment from an employees manager to continue the 121 process on a regular basis.