One-on-One Meeting Agenda and Notes

Keep one copy of this page per employee and add a new entry for each meeting. The employee fills in section 2 at least one day before the meeting. The manager adds items in section 3. Both read section 1 before starting.

MEETING DETAILS

Employee name

Manager name

Meeting date

Meeting cadence

☐ Weekly ☐ Every two weeks ☐ Monthly

Format

☐ In person ☐ Video ☐ Phone ☐ Walk-and-talk

Planned length (minutes)

1. FOLLOW-UP FROM LAST MEETING

Action items from last time and their status (done / in progress / dropped, with reason)

Anything promised by the manager that is still open

2. EMPLOYEE'S AGENDA (FILLED IN BY THE EMPLOYEE BEFORE THE MEETING)

What I want to talk about today (top 1 to 3 topics)

Wins since our last meeting

Where I am stuck or need a decision

How I am doing overall this week

☐ Great ☐ Good ☐ Okay ☐ Struggling ☐ Prefer to talk about it

3. MANAGER'S AGENDA

Updates the employee needs to hear from me (changes, decisions, context from leadership)

Feedback to give (one specific thing that went well, one thing to adjust)

Progress on current goals or metrics

4. ROTATING QUESTION (PICK ONE PER MEETING)

- ☐ What is one thing that slowed you down this week that I could remove?
- ☐ What part of your work are you enjoying most right now, and least?
- ☐ Is your workload sustainable for the next month? What would you drop if you had to?
- ☐ What is something you want to learn or try in the next quarter?
- ☐ Is there feedback you have for me that you have not said yet?
- ☐ Who on the team has helped you lately, and should we recognize it?
- ☐ If you were running this team, what is the first thing you would change?
- ☐ How clear are you on what good performance looks like in your role right now?

5. GROWTH AND DEVELOPMENT (AT LEAST ONCE A MONTH)

Progress on development plan or career goals

Training, stretch work or exposure we agreed to look for

6. DECISIONS AND ACTION ITEMS

Decisions made in this meeting

Action item 1 (what, owner, due date)

Action item 2 (what, owner, due date)

Action item 3 (what, owner, due date)

Topics parked for next time

Next meeting date

7. PRIVATE MANAGER NOTES (NOT SHARED)

Observations, follow-ups for HR, or concerns to monitor (keep factual; these notes may be part of the employment record)