

ONE-ON-ONE DIRECT REPORT SELF-PREPARATION FORM

Why Pre-Meeting Prep Matters: Completing this form before your one-on-one gives you ownership of your meeting, ensures your manager understands your challenges, and gives you a clear platform to ask for the resources and support you need.

Direct Report: _____ **Manager:** _____

Date: _____

1. Performance & Priority Tracking

Comparing status assessments side-by-side before the meeting instantly reveals alignment gaps. If your manager believes an initiative is off track while you think it is fine, that is an immediate signal to discuss expectations.

List top three to five goals. Check your self-assessed status. If off track, provide the reason why and your plan to get back on track.

1. **Goal / Priority:** _____

○ **Status:** ☐ Completed | ☐ On Plan | ☐ Off Plan

○ **Reason & Recovery Plan (if off plan):** _____

2. **Goal / Priority:** _____

○ **Status:** ☐ Completed | ☐ On Plan | ☐ Off Plan

○ **Reason & Recovery Plan (if off plan):** _____

3. **Goal / Priority:** _____

○ **Status:** ☐ Completed | ☐ On Plan | ☐ Off Plan

○ **Reason & Recovery Plan (if off plan):** _____

4. **Goal / Priority:** _____

○ **Status:** ☐ Completed | ☐ On Plan | ☐ Off Plan

○ **Reason & Recovery Plan (if off plan):** _____

ONE-ON-ONE DIRECT REPORT SELF-PREPARATION FORM continued

2. Follow-Up Items

This builds mutual accountability, ensures previous commitments do not fall through the cracks, and tracks progress over time.

- **Status and specific results of commitments made during the last one-on-one:**

3. Self-Feedback on Performance & Behavior

Self-awareness is key to growth. Comparing manager feedback with employee self-feedback highlights where confidence might be lacking or where blind spots exist.

- **Your recent wins or achievements to highlight:**

- **Areas where you feel you could improve or adjust:**

4. Challenges & Support Needed

Sharing your challenges shifts the manager's role from supervisor to coach and "unblocker," giving you a safe space to ask for help without feeling judged.

- **Biggest roadblock right now, and specific help/resources needed from your manager:**

5. Context & Important Details ("Things My Manager Should Know")

Managers cannot fix problems they do not know exist. Explicitly asking this question creates psychological safety for bringing up sensitive, early-stage issues or context your manager lacks.

- **Background context, emerging risks, or team dynamics your manager should be aware of:**

ONE-ON-ONE DIRECT REPORT SELF-PREPARATION FORM continued

6. Bidirectional Feedback & Process Improvement

This normalizes upward feedback to make leadership approachable while giving you ownership to eliminate red tape and suggest operational improvements.

- **Constructive feedback for your manager regarding support, communication, or guidance:**

- **One thing the team should START doing or STOP doing (and why):**

7. Looking Ahead

This moves the conversation from reactive troubleshooting to proactive planning while providing a necessary pulse check on burnout and retention risks.

- **Upcoming project risks, personal events, or obstacles in the next thirty days:**

- **Current overall feeling toward work (1-10, 10 = very happy):** _____ / 10

- **The single biggest change that would make work better for you:**

(Discussed one to two times per year)

8. Career & Growth

Discussing this biyearly ensures that long-term growth and skill development are not buried under day-to-day tasks.

- **Progress on your development plan & future career goals:**
