

ONE-ON-ONE MANAGER PREPARATION FORM

Why Pre-Meeting Prep Matters: Completing this form before your one-on-one aligns expectations, exposes perception gaps, ensures past commitments are met, and shifts management from passive supervision to active unblocking and coaching.

Manager: _____ **Direct Report:** _____

Date: _____

1. Performance & Priority Tracking

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

List top three to five goals. Check the appropriate status. If off track, note areas where you need to ask for their recovery plan.

1. **Goal / Priority:** _____

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

○ **Notes / Areas of Concern:** _____

2. **Goal / Priority:** _____

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

○ **Notes / Areas of Concern:** _____

3. **Goal / Priority:** _____

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

○ **Notes / Areas of Concern:** _____

4. **Goal / Priority:** _____

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

○ **Notes / Areas of Concern:** _____

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2. Follow-Up Items

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

- **Review the commitments agreed upon during the last one-on-one:**

3. Performance & Behavioral Feedback

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

- **Wins & strengths to recognize:**

- **Constructive feedback or behavior adjustments needed:**

4. Challenges & Support Needed

Listening to the employee's challenges and what they need shifts the manager's role from supervisor to coach and "unblocker," giving the direct report a safe space to ask for help without feeling judged.

- **Observed obstacles or areas where you can remove roadblocks / provide resources:**

5. Operational Updates ("What You Don't Know")

Managers cannot fix problems they do not know exist. Explicitly asking about problems that are affecting the employee creates psychological safety for bringing up sensitive, early-stage issues or context you may lack.

- **Key updates, team dynamics, or emerging risks to ask about:**

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6. Bidirectional Feedback & Process Improvement

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

- **Specific area of leadership performance you are requesting feedback on:**

- **Team processes or habits to discuss starting or stopping:**

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 milestones or risks in the next thirty days to prepare for:**

- **Estimating employee morale / engagement score: _____ / 10**

- **Actionable change to improve their work experience:**

(Discussed one to two times per year)

8. Career & Development

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

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