

4 one-to-one meeting templates

First one-to-one meeting template

Purpose: This meeting provides an opportunity for the manager to welcome the new employee, introduce them to the team and company culture, clarify expectations, and outline goals and objectives.

Meeting Agenda Checklist:

- Welcome and introduction
- Icebreaker question to get to know each other
- Discuss roles, responsibilities, and expectations
- Set short-term goals and priorities
- Agree on communication preferences and frequency of meetings
- Closing remarks and next steps

Questions to ask:

- What motivated you to join our team/company?
- Can you tell me about your short-term and long-term career goals?
- What do you hope to achieve in your role here?
- Are there any immediate challenges or concerns you'd like to discuss?

Weekly one-to-one template

Purpose: Teams can use weekly sync meetings as a perfect way to debate ongoing topics and issues. At Charlie, line managers usually check in with their reports on a weekly basis. We recommend that these meetings last around 15 minutes and cover the key questions below.

Meeting agenda checklist: After conducting many successful weekly syncs with our team, we've created a simple agenda checklist you can use to run your meetings.

Setting up a weekly sync:

- If you're not already having one-on-ones, explain what they are and why you're having them
- Schedule your recurring meetings

During your Weekly Sync

- Reflect and run through any actions from the last Sync
- Aim to listen as best as you can: PMs should be speaking for less than 50% of the Weekly Sync
- Take notes: Follow through is super important so it's helpful to keep notes of each Weekly Sync to help keep track of how your report is doing

After your Weekly Sync

- Share any action points with your report

Questions to ask:

- What's going well this week for you?
- What challenges are you facing at the moment?
- How are you doing in general – how are you feeling?
- Is there anything I can do support you better at the moment

Monthly one-to-one meeting template

Purpose: At Charlie, we use our monthly one-to-one meetings to stay aligned on big picture objectives and support each team member's development. If you're conducting a monthly 1:1 for your team, here's what the meeting agenda would look like along with questions you can ask.

Meeting Agenda Checklist:

- Reflect on achievements and challenges over the past month
- Discuss career aspirations and development opportunities
- Set goals and objectives for the upcoming month
- Review progress on professional development initiatives
- Address any concerns or feedback
- Closing remarks and next steps

Questions to ask:

- What were your key accomplishments and challenges over the past month?
- Are there any specific areas you would like to focus on for your career development?
- What goals would you like to set for the upcoming month?
- How can we further support your professional growth?
- Do you have any feedback or suggestions for improving our team dynamics or processes?

Quarterly performance review one-to-one meeting template

Purpose: Quarterly performance review meetings offer a structured opportunity to evaluate progress, provide constructive feedback, and set goals for the next quarter. To effectively conduct performance review meetings, use a performance software to easily track discussion points and progress.

Meeting Agenda Checklist:

- Review performance against quarterly goals and objectives
- Discuss strengths, areas for improvement, and development opportunities
- Set SMART goals for the next quarter

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Questions to ask:

- How would you assess your performance against the goals set for this quarter?
- What are your main strengths and areas for improvement?
- What specific goals would you like to achieve in the next quarter?
- Are there any obstacles or challenges hindering your performance that we need to address?
- Do you have any feedback on the performance review process or areas where we can improve?

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