

Individual Meetings

5 conversations that drive performance.

1. Role and Relationship Orientation – The purpose of the Role and Relationship Orientation is to get to know each individual and their strengths. Then, the individual's expectations should be aligned with the organization's overall objectives. Refer back to the Strengths Module and choose the questions from "The Manager Individual Strengths Conversations" for this annual discussion.
2. Quick Connect – The purpose of the Quick Connect is to connect with all employees once a week with an email, phone call, or hallway conversation to help overcome barriers and make sure people are on the right track.
 - a. What medium works best for your team?
 - b. When will you have this meeting?
 - c. Recommended format:
 - i. How are you? (or what did you do this weekend, etc.)
 - ii. What did last week look like?
 - iii. What does this week look like?
 - iv. How can I help?
3. Check-In – The purpose of the Check-In happens 1-2 times a month and gives the opportunity to discuss expectations, workload, goals, and needs.
 - a. When does this fit in your schedule?
 - b. What format/agenda would you use to gather topics and then send notes after the meeting (OneNote, shared document, etc.)?
 - c. Use the template included in this module for agenda guidance.

4. Developmental Coaching – Developmental Coaching Meetings should be 1-2 a quarter. The third module will provide an outline and additional structure on the developmental coaching module based on Marshall Goldsmith's coaching.
5. Progress Review – The progress review in an annual event to evaluate how the last year went. This should be more of a conversation instead of a score card. The next module in this section provides more detail on this meeting.