

## 1-1 Template and Instructions

Instructions pre-meeting:

1. **Accountability:** Declare future actions and progress on those actions >> hold each other accountable to agreements made.
  - a. Actions to (our next meeting date)
    - i. Copy your quarterly OKRs. Rename them "Actions to (our next meeting date)." For each Objective, write the highest value action that you can do to advance toward that Objective in the coming period (usually two weeks).
  - b. Actions since our last meeting
    - i. On actions from the prior period, please write out whether you completed each: **YES** or **NO**.
    - ii. If NO, please write out:
      1. **WHY? Why did you not complete the action? Either it was intentional [you realized that it was no longer a top priority], or unintentional [you forgot, or something blocked you].**
      2. If the miss was unintentional, please write out:
        - a. **HABIT? What will you do to ensure that you will not get blocked that way again?**
  - c. Update your
    - i. KPIs: Key Performance Indicators. Ideally, these are graphical (easier to read) and historical (show changes over time).
    - ii. Pipelines and Roadmaps.
    - iii. Status updates on projects
2. **Coaching:** Surface and resolve issues >> how to perform better as a company.
  - a. Write out the Good that has occurred since we last met in:
    - i. Company
    - ii. Department
    - iii. You
  - b. Write out the Not Good that is present in:
    - i. Company
      1. The issue:
      2. What I did to help create the solution:
      3. Proposed Solution:
    - ii. Department
      1. The issue:
      2. What I did to help create the solution:
      3. Proposed Solution:
    - iii. You
      1. The issue:
      2. What I did to help create the solution:
      3. Proposed Solution:

- c. Note: When unpacking Issues, it is easy to view problems as being created by someone or something else. When we do this, it is difficult to see a solution within our control. If, however, we ask ourselves how we contributed to the situation, a pathway to unwinding the issue that is within our control usually becomes quite clear.
  - d. List any other Topics that you would like to review.
3. **Transparency:** Collect feedback >> how to perform better as individuals.
  - a. Write out feedback on how I am performing as a Manager.
  - b. Please share the thought that you think will be most painful for me to hear. That is the feedback that will be most useful to me.

Format:

**Accountability:**

My Os (Objectives) for this quarter (preferably three or fewer)

- 1.
- 2.
- 3.

My future actions (max three total) toward my Os until (*insert date of next check-in*)

- 1.
- 2.
- 3.

Did I complete each past declared action, **YES** or **NO**?

- **WHY:** If no, why not?
- **HABIT:** What habit (or action) can I adopt (or do) to never reencounter this obstacle?

SENSITIVE goals and actions. (Put here anything related to PIPs).

- These will NOT be included in the company-wide messaging from this meeting.

KPIs: Key Performance Indicators (Link here.)

Pipelines and Roadmaps. (Link here.)

**Coaching:**

## The Good

- Company
  - o
- Department
  - o
- Me
  - o

## The Not Good (& Proposed Solutions)

- Company
  - o Issue:
  - o What I did to help create the situation:
  - o Proposed Solution:
- Department
  - o Issue:
  - o What I did to help create the situation:
  - o Proposed Solution:
- Me
  - o Issue:
  - o What I did to help create the situation:
  - o Proposed Solution:

## Topics

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SENSITIVE issues/solutions. (Put here anything related to PIPs).

- These will NOT be included in the company-wide messaging from this meeting.

## Transparency:

Report >> Manager

- Like
  - o
- Wish That
  - o

Manager >> Report

- Like
  - o
- Wish That
  - o

**Note:** A more traditional reporting structure is "Progress made toward OKRs" rather than declaring "Future actions toward OKRs." If you have a team member with a strong preference for the former, it is acceptable to use that format. It is a weaker form of accountability and leads to less progress toward OKRs, but more people are used to it.

### **Format to copy-paste for each meeting:**

Actions from last

Actions to next

- Objective 1:
- Objective 2:
- Objective 3:

The Good

- Company
- Department
- Me

The Not Good (100% Responsibility and Proposed Solutions)

- Company
  - Issue:
  - What I did to help create the situation:
  - Proposed Solution:
- Department
  - Issue:
  - What I did to help create the situation:
  - Proposed Solution:
- Me
  - Issue:
  - What I did to help create the situation:
  - Proposed Solution:

Topics

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Feedback

- Report >> Manager
  - Like
    -
  - Wish That
    -

- Manager >> Report
  - Like
    -
  - Wish That