



ETW Monthly 1-to-1 Meeting

Quick Reference Guide

The primary purpose of conducting 1-to-1's in a systematic and disciplined way is to achieve much better results both as individuals and as a team. This document will provide you with a quick reference guide to follow during your 1-to-1 meetings with your direct reports to get the best possible results from the time you are investing with them.

According to a Gallup Study, benefits of standardized continuous performance management include:

3X Increased employee engagement	22% increase in profitability
21% Increase in productivity	65% decrease in employee turnover

1-to-1 Checklist

PREPARATION:

- ☐ Ask your direct reports to update their goals in ETW a day or more prior to your 1-to-1
- ☐ Review your Stream for last minute updates prior to meeting with your direct report

SETTING:

- ☐ In person - turn your monitor so you can share the view of ETW on your screen
- ☐ Virtual meeting - share your screen so your direct report can see you drive and take notes in ETW
- ☐ By phone - ask your direct report to view his or her ETW account while you view your account



1-to-1 Checklist

Benefits Of The Monthly 1-to-1:

Opportunity for employees to learn exactly what is expected of them, where they stand in the organization and what they need to do to improve.

Demonstrate managers' commitment to their team members.

MEETING:

- ☐ Review the Execution Plan(s) (if you have access)
- ☐ Discuss the Strategy, KPIs, and Major Objectives and how these connect to your direct report's goals
- ☐ Highlight any KPIs or Major Objectives that need to improve or changes made to the execution plan
- ☐ Review your direct report's Major Objectives and Performance Requirements
- ☐ Make sure these are:
 - Still relevant
 - Have the appropriate status (Green/Yellow/Red)
 - Are correctly linked to Strategic Elements?
 - Have the right update interval?
- ☐ Confirm that the updates provided by your direct report are focused on getting better results and include:
 - Plan using YTD numbers
 - Actual using YTD numbers
 - Actions your direct report is taking to get better results (even if exceeding plan) along with the strategic thinking behind these actions
- ☐ Ask clarifying questions to ensure you have a full understanding of what your direct report is doing and why they are doing it. Do not make assumptions.
- ☐ Provide supportive and developmental feedback to help your direct report achieve better results
- ☐ Review prior commitments and set new completion dates if these have lapsed
- ☐ Note the items discussed and any action items with completion dates in ETW

If your direct report has direct report(s) do the following in addition to the above:

- ☐ Drill down into the your direct reports' team leadership hierarchy



1-to-1 Checklist

MEETING (continued):

- ☐ Ask how each team member is performing and discuss actions to get better results
- ☐ View the details of the requirements of any individuals on the team
- ☐ Make sure the requirements are appropriate
 - Spot check to see that the employee and manager are engaged and that the exchanges are focused on getting better results and include the strategic thinking behind that focus
 - Note supportive and developmental comments to the employee in ETW if appropriate
 - Ask if your direct report has all of the right people in the right seats and discuss any required actions to get there
- ☐ "View Stream of" your direct report or anyone in their leadership hierarchy
- ☐ Note if your direct report is replying to his or her direct reports' updates in a timely manner
- ☐ Look for the quality and frequency of the direct report's updates
- ☐ View the archive stream to see recent conversations that have been dismissed/archived and ensure these are supportive and developmental
- ☐ Provide feedback to help your direct report improve his or her management skills

1-to-1s are a critical part of the ETW Management Cycle and should be conducted no less than monthly. Clients who have engaged the ETW process speak to its effectiveness:

"I now have monthly meetings with my five direct reports. ETW has made us more productive because we focus on the key things that drive results for our company."

Joe Grygiel—Senior Director of Operations
Air Evac Lifeteam

"Following the ETW platform and model, each key player meets regularly with their team to discuss results and goals. Team members now strive to meet their objectives in order to drive the entire business, which has definitely helped us receive better results in the end."

Ray Cook, CHMM—Operations Manager
US ChemCare



1-to-1 Format

Benefits Of The Monthly 1-to-1:

Create value for the organization by improving employee communication, engagement, performance, teamwork and results.

Help managers achieve the results they seek while developing the capabilities of their team.

MEETING FORMAT

1-to-1s are formal performance conversations between team leaders and team members with the expressed intent of finding better ways to get results and make the business, the team and the individual team member more successful.

THESE MEETINGS FOLLOW A STANDARD AGENDA THAT INCLUDES:

- Review of the organization's strategy and most important goals via the Execution plan (if applicable)
- Review of your direct report's specific goals via the My Requirements page
- If your direct report also has direct reports:
 - Drill down through your direct reports' team leadership hierarchy to review team member goals and performance
 - Review of the interactions of your direct reports with their teams via the "View Stream of"

SCHEDULING & ENVIRONMENT BEST PRACTICES:

- Whenever possible these meetings should be scheduled on the same day and time each month.
- To demonstrate and reinforce the importance of 1-to-1s, these meetings should not be bumped or rescheduled unless absolutely necessary.
- These meetings can be conducted either in person, online by virtual meeting, or by phone, as long as both manager and employee have access to view the ETW system.

QUESTIONS?

See the Detailed User Guide for more best practices and information on how to most effectively conduct your 1-to-1 meetings.