



Agenda Based Approach MANAGER FRAMEWORK

Guidelines:

In this directed one-on-one meeting format, employees are given time to think through the questions and concerns that matter most to them in advance, encouraging more “open and earnest” observations.

Use this framework to guide you before, during, and after the meeting.





BEFORE

Set the agenda

Before the meeting, ask the employee for his/her feedback, questions, or input. Combined these with your observations and notes from your previous meetings, craft an agenda of topics to discuss, and give this to the employee in advance.

The goal is to get employees thinking about specific feelings or feedback before you meet

face to face and thoroughly discuss these, so make sure your meeting agenda is clear.

Preparation

- ❖ Find notes from your previous meeting
- ❖ Message employee asking for questions, concerns, input
- ❖ Note your own questions and topics for agenda
- ❖ Distribute agenda to employee before meeting

DURING

Make it comfortable for the person

It's important to allow the employee to open-up and stay focused. You would not want the employee to be defensive or clamed up. You would like to have open but specific conversations.

"How are you? Before we start, do you have any urgent matters pending? Are you comfortable?"

Touch-base

Are there open items, concerns, or observations from your last meeting that has not changed? Do you have any updates or deliverables that need to be evaluated or checked off?

Listen and absorb

Listen as you go through the questions, concerns, and observations the employee added to your agenda.

Be attentive and listen objectively to what the employee is saying. These are likely more in-depth thoughts, so listen attentively and take notes. Practice active listening and understand deeply what your employee is sharing. Avoid negative responses like getting accusatory or defensive during the discussion. Stay focused and hear the specific insights of employees on your team.

Positive outcomes

When it's your turn, emphasize the positive observations you've made about performance. Lead and build on the past wins. Pose open questions about other topics that can give you additional insight into how you're managing and the obstacles your team is facing.



DURING, continued

Discuss challenges

At the last stage, discuss challenges or obstacles the employee has raised or you've noticed the employee experiencing and seek feedback so both of you are on the same page.

"How can I help with these? What could I do to help you overcome this?"

Align expectations

Based on the thoughtful insights gathered, you can set and align expectations with the employee. What can you and the employee improve or change?

Agenda-based action items

- ❖ Follow up on open action items set previously
- ❖ Be prepared to answer employee questions and concerns given beforehand
- ❖ Note specific details of employee items
- ❖ Discuss manager-observed positives, challenges, and obstacles
- ❖ Set expectations and deliverables towards agenda for next meeting



NEXT STEPS

Check point (Recommended)

If you've had a number of 1-on-1s without a "career" check point, consider one here. Do the employees enjoy what they're doing right now? Are they still learning something new? Where do they see themselves in three to five years? Gauge if they seem fulfilled or happy. These meetings are an opportunity to connect on a personal as well as business level, adding trust to the manager- employee relationship. Make your employee aware that you want them to have a successful future in the company.

Be sure to follow through

Make it part of your process or routine as a manager. Walk-the-talk and demonstrate execution to maintain credibility. Schedule your next 2-3 meetings in advance to avoid disruptions. Plan and follow up on the goals and needs discussed. Adjust goals as needed based on employee feedback. *Hold both yourself and your employees accountable.*

Key Action Steps

- ❖ Note feedback shared and insights discovered in meeting
- ❖ Follow up on action items
- ❖ Schedule follow-up meeting

Avoid these common mistakes in your meeting structure

- ❖ Focusing too much on negative items
- ❖ Not allocating enough time to prepare
- ❖ Not using the goals as the center stage of the meetings
- ❖ Asking too many yes or no questions
- ❖ Being accusatory or defensive
- ❖ Failing to build credibility or trust

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