

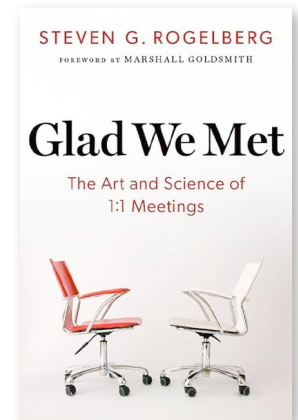


Executive Book Summaries®

Glad We Met

The Art and Science of 1:1 Meetings

by **Steven G. Rogelberg**



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THE SUMMARY IN BRIEF

Nearly half of 1:1s are rated as suboptimal by team members. Compounding the problem, leaders' self-ratings of their skills in conducting 1:1s appear to be inflated, suggesting that leaders think they are doing a better job at leading 1:1s than they actually are. The book, *Glad We Met: The Art and Science of 1:1 Meetings* deeply explores the “whats,” “hows,” and “whys” of 1:1s by highlighting challenges, pain points, opportunities, and areas for customization.

There is an incredible opportunity to fill this gap in leadership skills and to maximize the return of investment for this critical workplace activity. The problem is that despite 1:1s filling leaders' calendars, meaningful guidance on how to conduct 1:1s is quite sparse. Managers are left to rely on what feels right to them, repeating practices they have experienced by their current and former managers, and guesswork. The purpose of this book is to fill that gap, and to provide guidance on how to balance the scales between structure and flexibility, addressing short and long term topics, solving problems and building relationships.

IN THIS EXECUTIVE BOOK SUMMARY:

- The importance of 1:1 meetings between managers and direct reports
- Ways to conduct effective 1:1 meetings via planning, frequency, agendas, and listening.
- The benefits of 1:1 meetings that can lead to improved employee performance and development
- Additional tips about skip-level meetings and how to deal with meeting overload

Section 1: Do I Really Need to Do 1:1s?

Yes, you need to have 1:1s with your directs.

1:1s are a regular and recurring time for you, as a manager, to meet with your directs to discuss a variety of topics. 1:1s go beyond regular team meetings, having an open-door policy, or informal interactions. Instead, 1:1s are an intentional, dedicated time for you to support your directs.

1:1s are leadership in action. 1:1s are not an add-on to a manager's job, they ARE a manager's job. These meetings help ensure that your directs are in the best position to succeed and that you create a healthy working relationship with each member of your team.

1:1s are not performance appraisals. Performance appraisals are important, but they are not synonymous with 1:1s. Instead, 1:1s should be used to inform the performance appraisal process.

1:1s relate to various positive outcomes. Some of these outcomes include improved engagement levels, team member and manager success, diversity and inclusion, relationship development, direct report growth and development, and life satisfaction.

Won't Team Members Be Fearful of 1:1s?

Communication is key for starting 1:1s with your team. To do so effectively, set up a meeting with your entire team. Give them a rundown of what 1:1s are and why you will be having them.

Make it clear that all directs will be having 1:1s, tie the meetings to broader organizational and personal values, and stress that these meetings are not about micromanaging or control. Emphasize your desire to give your directs face time to address what is on their minds on a regular and consistent basis.

Encourage directs to ask questions. Ideally, answer these questions in a team meeting so that everyone receives the same answers, limiting the need for you to repeat yourself.

Can't I Just Meet When I Have Something I Need to Say?

Establish a 1:1 plan for your team. This ensures that you are actually having 1:1s with all team members and will help mitigate biases that could result in unconsciously favoring certain directs.

Find the right cadence. Avoid having an ad hoc (as-needed) approach to the cadence of your 1:1s. Research supports

weekly 1:1s as the best option in most cases.

Assess what's reasonable. To help navigate which plan is the best fit for you and your team, consider what is possible and reasonable. Things to consider include: whether you have remote team members; the preferences, experiences, and tenure of your directs; your tenure with the team; and the size of your team.

Get feedback and adapt. Recognize that when a direct indicates a lack of interest in 1:1s or seems interested in reducing their number, this could be a sign that 1:1s are not being conducted effectively.

How Should I Schedule 1:1s—Same Day, Clustered, or Spread Out?

Find a scheduling approach that works for you. While research suggests that clustering meetings tends to be most optimal to promote uninterrupted time, limit task-switching, and achieve greater flow, managers differ in whether they desire this approach.

Pick the schedule that aligns with your needs and preferences while also giving your directs some agency in this decision.

Understand that how meetings are scheduled can affect you and your directs, and plan accordingly. Build in microbreaks so you can digest information from the previous meeting and prepare for the next.

Schedule 1:1s during natural transition times to limit task-switching and cognitive demands. Last, if you want to have all of your 1:1s on the same day, that is fine. But be cognizant of your meeting load and how that may affect you and your 1:1s.

Very rarely cancel 1:1s. Doing so may be experienced by your direct that they are not a priority to you.

Shall We Take a Walk?

Space matters. Where you meet can affect how productive 1:1s are. Ensure that wherever you decide to have your 1:1s, the space is conducive to having an effective meeting.

Location options exist. There are both traditional and non-traditional location choices for 1:1s. Based on the research, traditional choices, like a manager's office or a private conference room, are great options. However, nontraditional locations exist too. Just be mindful of the pros and cons of each location. Virtual 1:1s are another great option that most employees are very open to.

“How are you?” is not enough. Asking a question like this is not thought-provoking or helpful in eliciting meaningful conversations.

Find what works, but also switch things up at times. Discuss with your direct reports what works for you both and consider switching the location up from time to time to prevent 1:1s from becoming stale.

Is a Good “How Are You” Enough?

“How are you?” is not enough. Asking a question like this is not thought-provoking or helpful in eliciting meaningful conversations.

There are so many good questions to consider. Ask more nuanced questions to create high-quality dialogue in your 1:1s.

Sample thoughtfully from these six categories:

1. Relationship-Building
2. Engagement
3. Check-In
4. Productivity/Challenge
5. Giving/Receiving Feedback
6. Development, Growth, and Career.

It may be overwhelming to decide what questions to use in your 1:1s, given how many options are available. This will take some prep work for you, but will boost the effectiveness of your 1:1 conversations and demonstrate your care, thoughtfulness, and support to your directs.

Switch up the questions you ask. Avoid asking questions from just one category. Also, make sure to switch up the specific questions you ask over time.

Do These Meetings Need an Agenda?

Agendas support effectiveness. Whether or not to have an agenda in 1:1s is a divisive question, but the data support their use. While setting up agendas will take some time, they can improve the effectiveness and value of 1:1s.

Directs must contribute to the agenda. Agendas support 1:1 effectiveness and value, but only if the direct contributes to them.

Two models of agenda creation are most recommended by managers. The listing approach has both you and your direct write down a list of topics to discuss. These items are then compared, and a final agenda is created. The core question approach starts with a list of questions managers bring to their directs, which are broad enough to let the direct take control of the meeting content.

Avoid the status update trap. You fall into this trap when 1:1s are focused on highly tactical, short-term topics—essentially asking your direct for a status update each meeting. You can avoid this trap by dedicating part of every 1:1 or all of some 1:1s to future-oriented topics, or by integrating these topics into the meeting agenda via a template.

Track metrics sometimes. Metrics can provide both you and your direct insight into how your direct is performing. However, you don't want to track these in every 1:1 because it can take away from their purpose and feel like micromanaging.

Section 2: Carrying out 1:1s

Is There a General Model for Conducting 1:1s?

Separate practical versus personal needs. Practical needs are tactical, focusing on how directs can successfully accomplish their work and advance their career. Personal needs are relational, focusing on how directs feel coming out of 1:1s. Both are needed for effective 1:1s. The key is to balance them within your meetings.

Use an integrated model. While there isn't a secret formula for conducting effective 1:1s, there is a general model you can use. Four stages embody this model: pre-start, start, the heart, and the end. The structure of the model helps address directs' practical needs.

Throughout each step, managers must also enact the five key relational behaviors to meet directs' personal needs. When combined, this integrated model can support your 1:1 effectiveness.

Note-taking is helpful. Taking notes during 1:1s creates accountability and documentation to increase the effec-

tiveness of your 1:1s, helps you better organize what is discussed in 1:1s, and increases the chances you don't miss anything. Notes can also allow you to follow up on action items or cover topics not discussed.

Ask for feedback. While this is an optional process step, asking for feedback from your directs periodically can further enhance 1:1 value.

What Do I Do to Meet the Personal Needs of Others?

Satisfying personal needs is critical. While 1:1s are meant to address directs' practical needs, they must also be conducted in a way that meets directs' personal needs.

Five Key Behaviors Are Needed to Meet Personal Needs

1. Listen and Respond with Empathy
2. Communicate Authentically and Transparently
3. Involve Directs
4. Be Kind and Supportive
5. Demonstrate Appropriate Vulnerability.

Each behavior is needed to support both 1:1 effectiveness and your relationship with your direct.

How Do I Start and End 1:1s—And the Middle Stuff Too?

Four Steps of 1:1s:

1. Pre-Start
2. Start
3. The Heart
4. End.

Each step is central to how 1:1s are conducted. The Pre-Start and Start Phases Set the Tone. The Pre-Start of 1:1s ensures you prepare for the meeting and show up with the right mindset. The Start of the meeting should begin with light topics and then dive into heavier topics such as discussing roadblocks or providing feedback.

The heart is central to 1:1 effectiveness. This is the core of the 1:1.

Five key phases happen in this phase:

1. Expressing
2. Clarifying and Understanding
3. Solutioning
4. Crafting Next Steps
5. Monitoring the Agenda.

These phases do not need to happen in a step-by-step manner. Let the conversation flow and proceed through the stages in a manner that makes good sense for the particular agenda topic.

End positively. The end of the 1:1 is a critical opportunity to review and informally document key takeaways. Always make sure to end on time, with gratitude, a reiteration of your support.

The Direct's Job During the 1:1 Is to Do What?

1:1s are a dance. Directs play an active role in making 1:1s work.

The 10 Direct Behaviors that are Critical:

Directs need to take an active role in your 1:1s to get the most out of them.

Ten key behaviors are critical in this respect:

1. Know What You Need
2. Be Curious
3. Build Rapport
4. Actively Engage
5. Communicate Well
6. Problem Solve
7. Ask for Help (Constructively)
8. Ask for Feedback
9. Receive Feedback Well
10. Express Gratitude.

These behaviors are also relevant for managers. While directs should enact these behaviors to increase the effectiveness of their 1:1s, they are also relevant for managers. For example, managers need to be actively engaged in 1:1s too.

Directs can give feedback, but in a considerate way. While it

The value of a 1:1s comes from their perception of whether the meeting is going well.

may seem daunting to do, you and your manager can benefit from providing upward feedback. However, it's important for you to go about it in a thoughtful way.

Section 3: After the Meeting

The Meeting Is Done, Now What?

Follow through on commitments. After the meeting ends, it is critical for both you and your directs to follow through on the action items they committed to. Breaking commitments hurts trust, hurts the working relationship, and makes it harder to have effective 1:1s in the future.

Broken commitments are usually avoidable. There are many reasons why commitments are broken, and they are often not because the person avoided accomplishing the task.

Set commitments up effectively. Several tactics can be used to make sure commitments are kept. Focus on creating clarity of what the action item is so people understand what they are to accomplish. Find ways to spark motivation and reduce barriers to success. Follow up with the other person on their progress and your own progress.

Did the 1:1 Work?

Our perceptions of 1:1s can be skewed. Our minds are powerful. They can work with and against us. You may think your 1:1s are going great, but your direct may think they are subpar.

Apply strategies to align perspectives. When reflecting on your 1:1s, identify specific areas that are going well and not well. Take the perspective of your direct when gauging whether your meetings are effective. Last, focus on your specific behaviors during the meetings and how they may support or hinder 1:1 effectiveness.

Ask your direct for their perspective. The value of 1:1s comes from their perception of whether the meetings are going well. Ask them for feedback and their thoughts on how your 1:1s are going.

Lagging indicators exist. The best way to see the long-term

success of your 1:1s and their effectiveness is with various lagging indicators. Are your engagement numbers for the team going up? Is performance rising and turnover dropping?

Section 4: Special Topics

Wait, There Are Skip-Level 1:1s?

Skip-levels are helpful. Skip-level 1:1s are meetings between you and your directs' directs. While these meetings aren't meant for you to take over as their manager, skip-levels are a great way for you to gain insight "on the ground" and to provide higher-up support to the team.

These 1:1s are used to get a pulse on what's happening in your team and those you oversee, build trust between different levels of the team, and share information and counsel. They aren't as frequently held but can provide insight that your regular 1:1s might not fully reveal.

Don't just start having skip-levels. Your first step in setting these meetings up for success is to let your immediate directs know that you plan to have them and why. Field any questions or concerns they may have, reiterating the true purpose of these meetings.

Then do the same with your skip-level directs. If you fail to do these steps, your skip-level 1:1s may be experienced like micromanaging, or may give the impression that there is a problem with their manager, or that the team is in trouble.

Set skip-levels up for success. Make sure you set up agendas and focus on developing rapport, especially early on. Hear what your skip-level direct would like to talk about and go from there, but have your standard questions ready to go. End the meetings by praising skip-level directs where you can and follow up on any action items you have committed to accomplishing.

Don't undermine your own directs. Skip-levels are a great way to get insight about your directs as managers, but don't undermine them. Listen with an open mind and ask if your skip-level direct has talked to their manager about the idea.

What do you do if you are drowning in meetings? Eliminating meetings is not the solution.

While employees often complain about the number of meetings they have, meetings are still an essential piece of organizational democracy. There are strategies to reduce the number and increase the effectiveness of meetings to combat the negative effects of too many meetings.

Have a conversation with your team. As a leader, you control your meetings. Start by having two conversations about your meetings.

First, set expectations around when meetings are warranted and when they are not. Second, talk about cutting back the time meetings are held for, such as by holding what has been a 60-minute meeting for 50 minutes. Having these conversations will reduce the number and time spent in meetings.

Increase meeting effectiveness. Rather than eliminating meetings, the goal is to make meetings more effective, which will save rework time and allay fatigue and frustration.

There are various tactics you can use as a leader that can help with this, which can be broken down into pre-meeting, during-the-meeting, and end-of-meeting practices. Examples of such practices include creating compelling agendas, actively facilitating the meetings to boost energy, experimenting with different strategies such as silent brainstorming, and having a proper close to a meeting to assure action.

Organizational strategies exist. These range from requiring approval for larger meetings to including meeting metrics on engagement surveys. While these may be harder for you to influence and these tactics vary by organization, they do help in the pursuit of lowering the number of overall meetings.

Final Thoughts—It's About Values

1:1s embody your values. Our behaviors signal our values, and our values tell others what is important to us. 1:1s are a critical way for you to support your people, demonstrate your leadership abilities, and improve key outcomes for your team and organization. Therefore, while 1:1s may be seen as a choice, they should be seen as an obligation.

1:1 meetings are essential for building strong working relationships, ensuring your directs have the support they need, and achieving positive outcomes for both your team and the organization.

This book has equipped you with the knowledge to set up successful 1:1s, from establishing a cadence and agenda to conducting the meetings themselves and following up afterwards. Remember, 1:1s are an investment in your people and your team's success. By prioritizing these meetings and approaching them with intentionality, you can create a space where your directs feel heard, valued, and empowered to do their best work.



Steven G. Rogelberg is Chancellor's Professor at University of North Carolina, Charlotte, for distinguished national, international, and interdisciplinary contributions. He has well over 100 publications and has received the highly prestigious Humboldt Award for his research on meeting science. His work has been profiled in the Harvard Business Review, CBS News, Wall Street Journal, Washington Post, Chicago Tribune, NPR, Guardian, National Geographic, and Scientific American Mind, among other outlets.

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