

Employee Name:

Look at your employee's strongest Motivating Needs. Circle the highest (furthest right) and lowest (furthest left) factor. Write in their strongest below.

Strongest Motivating Need:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

Do and Avoid: Based on your employee's highest and lowest factor, circle or check one or two items to which you will adapt.

LOWEST	FACTOR	HIGHEST
Give reassurance of their role and your confidence in them. They like freedom from conflict and competition. "World peace."	A Dominance	Always challenge them to up their game/achieve more. Focus on outcomes/impact: They win if <x>. They lose if <y>.
Give them private time to think. Written communications. Substance, no fluff. Don't put them on the spot.	B Extraversion	Do NOT cancel their 1-1. Give recognition for how they are impacting others. Share info early on and ask for their input. Let them talk as a way to think.
Load them up with work, variety, challenge. Brief, concise communications focused on actions. Reinforce and check for understanding on the most important elements.	C Patience	Give time to consider , bring back questions. Time to get ready/build a plan. State the why. Offer clear timelines and deadlines but don't pressure.
Give outcomes/deliverables with clear guardrails but room to figure out how . Help them think through mundane details, contingencies.	D Formality	Offer depth and clarity of expectations (in writing) to get started. Ask, "What else do you need to begin?" and "What are you worried about?" Frequent, ongoing feedback.

Goals:

My main goals with starting the 1:1s are:

☐ Coaching ☐ Connection ☐ Development ☐ Other _____

Questions Library:

Refer to the questions library in your workbook and write questions you want to use more often with this employee:

Timing: *Frequency*

Timing: *Length*

Agreement:

I will meet with this person and get agreement on new 1:1 approach by the following date:

Opening Conversation Checklist:

- ☐ Goals and value of 1:1s (Why?)
- ☐ What's in it for the employee (and leader)?
- ☐ Gauge their reaction/input/opinion of having 1:1s
- ☐ Agenda agreement (step/purpose/owner)
- ☐ Roles and expectations (Who will prepare what?)
- ☐ Metrics and data to measure goals during these 1:1s
- ☐ Questions, concerns, other input
- ☐ Agree on start date
- ☐ Verbal summary of who owns what and when