



# One-To-One Template

A structured one-to-one template to support meaningful, consistent conversations between managers and team members. It helps keep discussions focused on wellbeing, performance and flexible working needs

# Quarterly One-To-One Template

Employee:

Manager:

Date:

Online

In person

## 1. Working Pattern & Wellbeing

Purpose: Check in on how the employee is feeling about their working pattern, balance and overall wellbeing.

Notes

## 2. Workload Review & Red Flags

Purpose: Identify pressure points early and ensure workloads are fair and manageable.

Notes

### 3. Review of Priorities since last 1-2-1

Purpose: Recognise achievements and maintain momentum on key goals.

Objective	Progress	Comments/Learning

### 4. Priorities for Next Quarter

Purpose: Clarify focus areas and support alignment with organisational goals

Objective	Measure/Indicator of Success	Timescale

## 5. Learning & Development

Purpose: Explore upskilling, training and growth opportunities.

Notes

## 6. Living Our Values

Purpose: Reflect on how day-to-day work aligns with our shared values and culture.

Notes

## 7. Feedback & Connection

Purpose: Encourage two-way communication and continuous improvement, i.e.

- What feedback do you have for me/leadership/the organisation?
- Is there anything we could be doing differently as a team?

Notes

## 8. AOB

Notes

## 9. Summary & Follow-Up

- Key takeaways/agreements
- Actions for employee/manager
- Date of next 1-2-1