

## Preparation Checklist for 1:1 Facilitation

This tool serves as a reminder checklist for facilitating your 1:1s.

Effective Facilitation: Key Behaviors		
Category	Key Behaviors	
Expressing	• Start positively to get your direct talking.	[ ]
	• Follow up on previous action items at the start of the 1:1.	[ ]
	• Show appreciation for your direct’s perspective.	[ ]
	• Use appropriate body language and eye contact.	[ ]
	• Manage the climate to build trust.	[ ]
	• Motivate, empower, support, and inspire directs.	[ ]
	• Encourage open dialogue.	[ ]
Clarifying & Understanding	• Paraphrase what you hear.	[ ]
	• Stay neutral during decision-making.	[ ]
	• Actively listen so your directs feel heard and understood.	[ ]
	• Follow up on questions to create clarity on motives.	[ ]
	• Synthesize you and your direct’s ideas.	[ ]
	• Ask questions to get to root causes.	[ ]

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Solutioning	• Gently test/challenge your direct's assumptions.	[ ]
	• Provide general counsel, support, suggestions, and advice.	[ ]
	• Work collaboratively on problems.	[ ]
	• Identify available support and resources for your direct.	[ ]
	• Allow directs to problem solve first, then offer suggestions.	[ ]
	• Lean into silence in the 1:1.	[ ]
Crafting Next Steps	• Record ideas by taking notes.	[ ]
	• Communicate clear expectations for next action items.	[ ]
	• Ensure action items are specific, achievable, and time-bound.	[ ]
	• Summarize key discussion points.	[ ]
	• Establish action items at the end of the 1:1.	[ ]
	• Make certain action items are agreed upon.	[ ]
	• Follow up on action items after the 1:1 for accountability.	[ ]

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<b>Monitoring the Agenda</b>	• Start with high-priority agenda items.	[ ]
	• Use the agenda, but don't use it as a crutch.	[ ]
	• Be flexible to what your direct wants to talk about.	[ ]
	• Ensure key points are discussed.	[ ]
	• Keep discussion on track.	[ ]
	• Assess timing so meeting ends on time.	[ ]
	• Move agenda items not addressed to the next 1:1.	[ ]
	• Discuss agenda items not discussed offline if necessary.	[ ]
	• End meetings with gratitude.	[ ]
<i>With all behaviors, do the following:</i>		
	Listen and respond with empathy.	[ ]
	Communicate authentically and transparently.	[ ]
	Involve directs appropriately.	[ ]
	Be kind and supportive.	[ ]
	Demonstrate appropriate vulnerability.	[ ]