

Monthly 1:1 Meeting Template

Date	Employee's name	Manager's name

Section A: Coaching & Wellbeing Questions

1. What has been your biggest accomplishment this month?	2. What is your biggest challenge right now?
3. Quality Improvement Opportunities: Is there anything your department or the organisation could be doing differently?	- What steps have you taken so far to address the challenge?
4. What resources / equipment would be helpful to you right now to achieve your operational goals? Discuss how this could be funded.	- What can your manager do to help you overcome this challenge?
5. How can I help you be successful in your role? <i>(Discuss any skills development or support needs, ways of working together, wellbeing concerns, items for escalation etc).</i>	

6. How are you and your team travelling right now?

Struggling | Doing OK but Challenged | Good | Thriving

Are there any work-related stress factors we need to discuss? Are there any wellbeing concerns? Are you clear on the supports available for you and your team? What are the challenges we need to unpack and address? How can I support you and your team?

Section B: Reward & Recognition (Alignment to values, random acts of kindness)

Which individual or department would you like to recognise this month for going over and above and/or for actively demonstrating our values? What did they do? *(Include reference to the specific action in the thank you note)*

Section C: Operational Reporting

Agreed Operational Goals	Current Month Result	Comments / Explanation of Variance and Corrective Measures Undertaken

Section D: Department Indicators *(Complete only if you have operational responsibility for an area)*

Sick Leave: %	WorkCover claims:	Grievances:	Compliments:
Turnover %	Mandatory Training: %	Performance reviews: %	Complaints:

Section E: Risk Assessments *(Physical and Psychological Harm Risks, Work Related Stress Factors)*

Issue/Risk	Contributing Factors (known, suspected, or under investigation)	Actions to manage risk

Section F: Other Items for Discussion

Item	Comments

Action Register (Document agreed actions to be taken from this meeting)

Item Ref. (Section A, D, etc)	Action to be taken (All action items to be carried over until completed)	By whom	By When	Completion Date

Instructions & Attribution

FOR A FREE EDITABLE WORD VERSION PLEASE EMAIL: TANYA@TANYAHEANEYVOOGT.COM

Workplaces have my express permission to adapt and utilise this template internally as long as section A remains in place. This template and specifically section A questions are designed to support the accountability and wellbeing of teams and guide leaders on holding effective and supportive conversations to promote psychological wellbeing in the workplace.

Any other use of this template (consultants) please attribute the source.

Developed by Tanya Heaney-Voogt – Helping Leaders Transform Workplaces

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