One-to-One Meetings (OTOMs)

What are one to one meetings?

A one-to-one meeting (OTOM or 1-2-1) is a regular opportunity for a manager to look at the performance of an individual in their team. In a sales environment it focuses on sales figures and other sales-related KPIs; in a service, office or warehouse setting it might focus on the individual's progress with relevant KPIs, objectives, tasks and projects.

Why should I carry out OTOMs?

A OTOM may be the best opportunity you ever have of getting to know an individual, how they are doing, what motivates them, and what their development needs are. When properly conducted, a OTOM will:

- Allow you to recognise and commend performance achievements
- Help you identify the strengths an individual has that could usefully be passed on to the rest of the team
- Help identify what training an individual may need themselves to perform better
- Give you an opportunity to set standards and goals
- Provide a chance to give and discuss feedback
- Allow the individual to raise any matters of concern

What if I don't carry out OTOMs?

Apart from denying yourself the communication opportunities listed above, you will also send out a message to your team that other matters are always more important than the team and individuals, and at worst that you 'just don't care'. You will also find it very difficult to manage the performance of an individual who has had no OTOMs as they may be unaware of the standards of performance you require.

Beware also the effect of not having OTOMs with **all** of your team. There may be some – possibly the under-performers – who need more of your time than others, but remember that your top performers need you too! They need you to acknowledge their successes; to fail to do so will de-motivate them which may lead to a fall in their performance.

Preparing for a OTOM

Before your meeting, you will need to do some preparation:

- When will you hold the meeting? Consider peak activity times, how many of the team are available to cover, and what else is due to happen during that time.
- How often will you hold the meeting? The company standard in Konica Minolta is to hold OTOMs every month for your team, or more often if the person needs it such as a new starter or underperformer.
- For how long will you hold the meeting? A new starter will need more of your time than a high performer. Allow about half an hour; the meeting may be shorter or longer, so be prepared to be flexible.
- Where will you hold the meeting? Consider where you will be free of interruptions, by people or phone calls, and where two people can sit in reasonable comfort.

- What information will you need? This could include figures for sales, margin, and other KPIs, objectives set at the last PDR, notes from the last OTOM, and any notes you have made since the last meeting relating to particular incidents.
- Let the other person know when and where the meeting will be, and what you will be discussing. You may find that just knowing what you'll be looking at has the right effect on their performance!

During the meeting

Topics to include in your meeting will include:

- Constructive feedback (see the 'Top Tips' on Feedback using the EEC model) – it will set the meeting off to a good start if you are able to compliment the person on a particularly good piece of work, or an incident handled well, etc. You may also need to give feedback on where they could improve, if you have seen a particularly poor incident.
- Review previous OTOMs from past OTO documents – see below.
- Review their objectives and/or KPIs – briefly and learning key lessons – don't get into lengthy 'post-mortems' as this will waste precious time
- Coaching – asking questions to guide the person to better business performance (see the 'Top Tips' on Coaching). As well as feedback, this will include you using questioning and active listening skills.
- If necessary, setting new objectives – these may be related to business objectives/figures or to the skills and knowledge the person needs to learn.
- Briefly discuss training and development and future needs. If the person is about to attend a training workshop or has just attended one, use the opportunity to prepare them, gain feedback on the event or ask them how they will put the learning into practice.
- Sensitive issues – there may be other issues you need to raise, such as a person's attitude, relationships, or personal hygiene. Do not shy away from these as they will only get more urgent with time, not disappear.
- Issues arising – be prepared for the individual to raise matters outside the scope of the points above. These could be literally anything! If an issue is raised on which you feel you should take advice before responding, you can adjourn the meeting and conclude when you have taken advice and are better prepared.

Taking notes

You will need to familiarise yourself with, and complete, the standard Konica Minolta OTOM document. Briefly record:

- Performance against objectives/KPIs
- Performance summary
- Key actions agreed for next month
- Feedback on capability and any actions arising
- Review of any learning & development
- Learning & development activities for next month

When completed, give a copy to the person and keep these documents in an appropriate safe and secure place until you need them again.

After the meeting

Use your notes from this meeting to help you prepare for the next one. If you have agreed to do something, then make sure you do it – a broken commitment is worse than no commitment at all. You should also observe the employee in action, to see whether actions agreed have been put into practice, and whether specific tasks have been completed before the next meeting.

For related topics see Top Tips:

- ➔ **Assessing**
- ➔ **Feedback**
- ➔ **Objectives – Writing**
- ➔ **PDR**
- ➔ **Recording Your Learning**