

Template • Date: _____

[Team member]: one-on-one notes

Catchup:

e.g “partner has been interviewing for that new job”

Follow up items from last time:

Note down anything you particularly wanted to mention, and copy in items from your shared document if you have one

Notes

Action items:**Regular check-ins to consider**

- Progress towards quarterly goals
- Performance compared to the rest of the service team
- Leave planning
- Professional development plans

Conversation prompts

- I'm looking for a new book to read, got any suggestions?
- If we had nothing else on, what would you love to work on?
- Are there any courses you're interested in taking?
- Which questions in the support queue do we get too many of? What should we do about it?
- What would you magically change in our product if you could?
- How could we improve our first-response time without adding new people?