

One-on-One Meeting Template for Senior Finance Executives

This template guides Senior Finance Executives in conducting effective one-on-one meetings with their team members. It focuses on fostering open communication, career development, and overall engagement.

Meeting Preparation

1. **Review Team Member's Goals:** Examine the employee's most recent performance review and any previously discussed goals.
2. **Consider Recent Events:** Reflect on any recent projects, challenges, or successes the team member has experienced.
3. **Encourage Agenda Input:** Ask the team member to submit any topics they'd like to discuss beforehand.

Meeting Structure (Estimated Time: 45-60 Minutes)

1. Warm-up (5 Minutes)

Start with a casual conversation to build rapport and check in on the employee's well-being.

2. Performance & Goal Review (15 Minutes)

- **Discuss Progress:** Review progress on previously set goals using the SMART framework (Specific, Measurable, Achievable, Relevant, and Time-bound).
- **Identify Roadblocks:** Identify any obstacles and adjust goals if necessary.

3. Development & Growth (15 Minutes)

- **Skills and Knowledge:** Explore the employee's career aspirations and discuss opportunities for skill development through training programs, conferences, or internal mentorship programs.
- **Stretch Assignments:** Consider assigning challenging projects or tasks to encourage growth and provide opportunities to showcase talent.

4. Engagement & Recognition (10 Minutes)

- **Feedback & Recognition:** Provide specific and genuine feedback on the employee's performance, highlighting achievements and contributions.
- **Challenges & Frustrations:** Listen actively to any concerns or roadblocks the employee faces and work collaboratively to find solutions.

5. Career Path Discussion (10 Minutes)

- **Career Goals:** Discuss the employee's long-term career goals and explore potential paths for advancement within the company. Be transparent about promotion opportunities and required skill sets.
- **Internal Mobility:** Explore internal job openings or cross-functional projects that align with the employee's goals and interests.

6. Action Items & Next Steps (5 Minutes)

- **Summarise Key Takeaways:** Recap the main points discussed and agreed upon.
- **Set a Follow-Up Timeline:** Establish a timeline for follow-up discussions and goal reviews.

Additional Tips

- **Create a Safe Space:** Encourage open and honest communication by fostering a safe and trusting environment.
- **Actively Listen:** Pay close attention to the employee's concerns and ideas.
- **Focus on Solutions:** Work collaboratively to find solutions to any challenges or roadblocks.
- **Follow-up:** Hold yourself accountable for following through on action items and commitments made during the meeting.
- **End on a Positive Note:** Consider concluding the meeting with a positive and motivational note, expressing your confidence in the employee's abilities.

Using this template and incorporating these tips, you can conduct one-on-one meetings promoting employee engagement, development, and retention within their teams.

For further insights and resources, check out more on the HPR website here:

<https://www.hprconsulting.com/insights-resources/>

If you have any questions or we can help with any recruitment needs, please feel free to contact one of our directors here:

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