

This document has an overview of the different forms, documents and sheets used in EA London's 1-1 meetings. There is also a process flow from start to finish.

The most important thing might be to keep on testing out new things and see what works for you and to spend a few minutes after every meeting to think about what went well and what could be improved. It may be that a more streamlined process with less documentation would be much better for some people.

There are a few different types of 1-1 that I have had in the last couple of years, mainly career 1-1s, but there have also been people who have signed up via our intro coffee form, people who have asked to meet up and people I have reached out to, to get community feedback.

Resources Used

- Forms
 - [Application form](#) (careers), [Coffee Intro](#)
 - [Feedback & Impact form](#) (2/3 months after meeting and only for career people, I don't ask for feedback from other types of meeting)
 - Long term impact (12 months later) - I usually send a short email with one ask, as it seems more likely to get a response than asking someone to click through and fill out a form. "Are you able to write a sentence on any career/donation/life changes you made resulting from the 1-1 we had in December 2017?"
- Documents
 - 1-1 meeting sheet for keeping track of who we are meeting, where and when, and also what stage of the process they are in - [Template](#)
 - Question lists (these are very rough, feel free to add better questions)
 - [How to work out values, causes, personal fit and careers](#)
 - [What goals to consider, choose and execute](#) - 80k article
 - [Feedback on EA and getting to know them](#) - community and coffee intro questions
 - Frequently used links - I have a document with the links I seem to use repeatedly to save time finding them (A lot of these are now on the [EA London website](#))
- Third party apps
 - [Calendly](#) ([1-1 meeting with me](#) for example)
 - Google Calendar
 - Email
 - Typeform/Google Form

Process Flow

1. Person hears about 1-1 meetings (newsletter/website/FB group/in person)

2. They fill out application [form](#)
3. We get an email notification and then either
 - a. Send out a [calendly link](#) via email to people who might find a 1-1 meeting useful
 - b. Think they can be helped most efficiently with some links or contact details without meeting, and send an email with those details
 - c. Find someone else who may want to chat with them
4. They choose a time and can suggest a location and include their phone number
5. We are notified and think about questions and location. Update 1-1 meeting sheet
6. We email them confirming location (or suggesting one) and include questions to think about, maybe some useful readings and my phone number - [Example email](#)
7. Meet up and take notes. I usually have the [following structure](#) when meeting to talk about careers
8. Email after the meeting with notes, links and intros to people who may be useful. Update 1-1 meeting sheet - [Example email](#)
9. Three months after the meeting, send [impact form](#)
10. 12 months later email asking about longer term impact