

**PROMPT WO-035**

Conduct a One-to-One Meeting

Purpose

Use this prompt to prepare and document productive one-to-one meetings between a manager and an employee. It helps ensure regular check-ins are structured, supportive, and focused on performance, wellbeing, development, and future goals.

DIFFICULTY **Beginner****TIME SAVED** **20–30 min****BEST FOR****1:1 Meetings**

Best AI Tools

- ChatGPT
- Claude
- Microsoft Copilot
- Google Gemini



Copy & Paste Prompt

You are an experienced People Manager.

Create a structured one-to-one meeting agenda and summary using the information below.

Employee Name:

[Insert employee name]

Job Title:

[Insert job title]

Manager:

[Insert manager's name]

Meeting Date:

[Insert date]



Purpose of Meeting:

[Weekly check-in, monthly review, wellbeing, career development, etc.]

Recent Achievements:

[List achievements]

Current Priorities:

[List key tasks or projects]

Challenges:

[Describe any issues or obstacles]

Employee Feedback:

[Summarise comments from the employee]

Manager Feedback:

[Summarise comments from the manager]

Development Opportunities:

[List training, coaching or new responsibilities]

Actions Agreed:

[List agreed actions]

Next Meeting Date:

[Insert date]

Tone:

Professional, supportive and collaborative.

Please:

- Create a structured one-to-one meeting document.
- Include a meeting agenda.
- Summarise achievements and current priorities.
- Highlight any challenges and proposed solutions.
- Record feedback from both the employee and manager.
- List agreed actions with owners and deadlines.
- Finish with the next meeting date and a positive closing statement.

Return only the completed one-to-one meeting document.

Example



INPUT

Employee: Lisa Green

Job Title: Customer Service Advisor

Meeting Purpose: Monthly one-to-one

Recent Achievements:

- Achieved 98% customer satisfaction.
- Supported two new starters.

Challenges:

- High workload during peak periods.

Development Opportunities:

- Excel training.
- Shadow a Team Leader.

EXPECTED OUTPUT

One-to-One Meeting Summary

Meeting Details

Employee: Lisa Green

Manager: Sarah Jones

Date: 15 September

Purpose: Monthly One-to-One

Agenda

1. Review recent achievements
2. Discuss current workload
3. Review wellbeing
4. Discuss development opportunities
5. Agree actions

Recent Achievements

Lisa achieved a customer satisfaction score of 98% and successfully supported the induction of two new team members. Her positive attitude and willingness to help others continue to make a valuable contribution to the team.

Current Priorities

- Maintain customer satisfaction above 95%.
- Continue mentoring new colleagues.
- Complete mandatory compliance training.

Challenges Discussed



Lisa highlighted increased workloads during busy periods. It was agreed that workload distribution will be reviewed and additional support provided where necessary.

Feedback

Employee Feedback

Lisa enjoys supporting new starters and would like opportunities to develop into a Team Leader role.

Manager Feedback

Lisa continues to demonstrate excellent customer service skills and is encouraged to continue developing her leadership capabilities.

Development Opportunities

- Complete intermediate Excel training.
- Shadow a Team Leader for one day each month.
- Attend an internal leadership workshop.

Agreed Actions — see table below

ACTION	OWNER	DUE DATE
Complete Excel training	Lisa	30 October
Arrange Team Leader shadowing	Manager	20 September
Review workload allocation	Manager	Next team planning meeting

NEXT MEETING

Date: 15 October

CLOSING COMMENTS

The meeting concluded positively, with clear priorities, agreed actions, and a shared commitment to Lisa's continued development and wellbeing.

 **Builder's Tip:** *One-to-one meetings should be conversations, not status updates. Give employees the opportunity to share ideas, raise concerns, and discuss their career aspirations. Consistent check-ins build trust and strengthen working relationships.*

Related Prompts

- WO-031 – Write a Professional Performance Review
- WO-032 – Write Constructive Employee Feedback
- WO-033 – Create a Personal Development Plan



- WO-036 – Create a Performance Improvement Plan (PIP)

Tags

ONE-TO-ONE

EMPLOYEE
DEV

LEADERSHIP

HR

COACHING