

GETTING STARTED GUIDES

Designing Your Approach:

1-on-1s

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Why 1-on-1s

Creating an engaged, high-performing culture is an ongoing process, not an event. At Quantum Workplace, we believe that managers are the central drivers of your workplace's culture. Therefore, equipping your managers to have effective 1-on-1s - or lightweight, continuous conversations throughout the year - is a great way to drive engagement of their team, one team member at a time.

Many people associate 1-on-1s with performance conversations, especially with more and more organizations ditching the annual performance review in favor of more frequent check-ins. 1-on-1s ARE a great way to discuss performance and goals in-real time, but they offer so many more benefits. When done well, 1-on-1s allow managers to:

- Build and strengthen a trusting relationship with each team member
- Create alignment on the employee's goals and performance
- Tackle challenges the employee may be facing
- Determine priorities the employee should be focusing on
- Discuss organizational changes, decisions, or initiatives that impact the employee
- Together think about the employee's plans for development and growth

How it Works

Quantum Workplace's 1-on-1 feature doesn't replace conversations. Instead, it makes them more effective. With our 1-on-1 feature, managers can:

- Eliminate uncertainty with tool-prompted prep work, intelligent alerts, and instant two-way messaging
- Launch 1-on-1 meetings at any time or set automated cycles
- Leverage 1-on-1 templates with questions that encourage engaging and useful conversations
- Keep a record of all conversations in-tool so no details slip through the cracks

Optimizing the Experience

Like fine wine and artisan cheese or plain ol' peanut butter and jelly, our 1-on-1 feature pairs well with other Quantum Workplace features. For instance, using our goals feature makes performance and goal check-in conversations easier. Feedback from peers or upward feedback can also supplement 1-on-1 conversations. The 1-on-1 feature alone can enable engaging conversations between managers and employees, but we recommend pairing it with other features to help managers and employees drive employee engagement year-round.

Curious where to start? Check out a roadmap below or chat with a Quantum Workplace team member for ideas.

What's your main priority?



Making the Technology Seamless

Before diving into the specific design of your approach to 1-on-1s, we recommend that you begin the process of HRIS Integration and Single Sign-On. (If your organization has already done this with Quantum Workplace, you're all set to jump ahead and start designing 1-on-1s!)

HRIS Integration allows your organization's roster of employees, their demographics, and all reporting relationships to be accurate and up-to-date in our software. This provides a seamless experience for your users, helps you analyze usage and data in meaningful ways, and allows automation of some of the features. The setup time can take a few weeks, but it's worth it!

Single-Sign On will prevent your employees and managers from needing to remember yet another set of login credentials, making it easier for users to adopt features into their everyday workflow.

We like to get this process started early so it's complete once you're ready to launch the software to users. Not a tech person? No worries! Your Client Success Manager will partner directly with your technical team members.

Designing Your Approach

1 Determine the 1-on-1 Conversation Topics and Cadence

Before learning about the bells and whistles in Quantum Workplace's 1-on-1 feature and how you might use them, think about the types of conversations you want your managers and employees to have and how frequently they should occur. Quantum Workplace recommends 4 different types of 1-on-1s occur throughout the year to empower your managers to continuously drive employee engagement and effectiveness:



1. Goal-Setting 1-on-1

- To start the year off right, the manager and employee should discuss the employee's performance and developmental goals. This 1-on-1 creates alignment between the manager and employee on what work needs to be done in the upcoming year. It also allows the manager and employee to discuss how the employee's individual goals contribute to team and organizational goals.
- During this time, the manager and employee can identify barriers, discuss which goals are stretch goals, and determine if additional resources may be needed to achieve the goals.

2. Performance Check-In 1-on-1

Each quarterly check-in after the Goal-Setting 1-on-1 is a critical opportunity for the manager and employee to discuss:

- Where the employee stands on his or her goals
- Barriers or challenges to achieving goals
- If certain goals have become higher priority than others
- Feedback on how the employee can improve

If your organization uses an annual performance review, these quarterly check-ins allow open and transparent dialogue about the employee's performance throughout the year. This makes the annual performance review easier to prepare for and prevents the employee from being surprised at year-end.

3. Career Development 1-on-1

Because career development is an important driver of both employee engagement and employee retention, we recommend at least one 1-on-1 conversation devoted to career development per year.

Managers should seek to understand the employee's aspirations and interests so they can serve as a champion for their employees' development and growth. This empowers employees to feel ownership for their development and positions managers as a coach.

4. Monthly 1-on-1s

If you're aiming for continuous conversations throughout the year, encourage monthly 1-on-1s between managers and employees to supplement the 1-on-1s listed above. These can be brief and informal, but they allow an employee to share ideas, ask questions, discuss challenges or concerns, or talk about feedback they have received from a peer or customer.

Regardless of the specific topics discussed, monthly 1-on-1s provide a manager and employee an important opportunity to develop a relationship and build trust.

The 1-on-1 conversations above help managers and employees stay aligned on critical topics that influence engagement and performance. Managers and employees may also benefit from these additional types of 1-on-1 conversations:

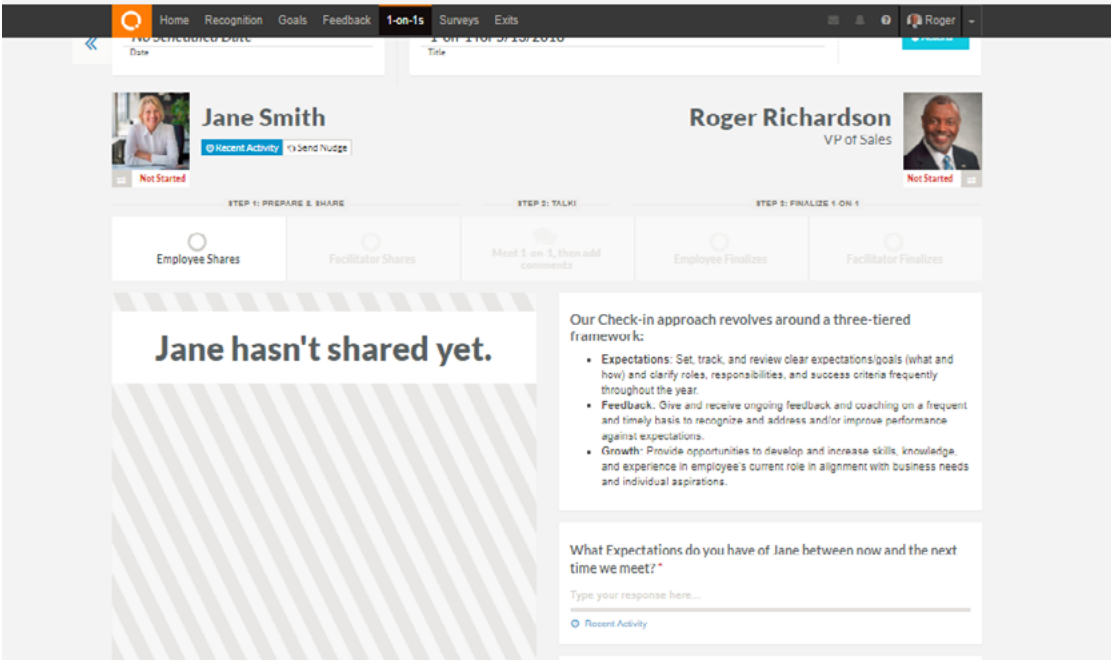
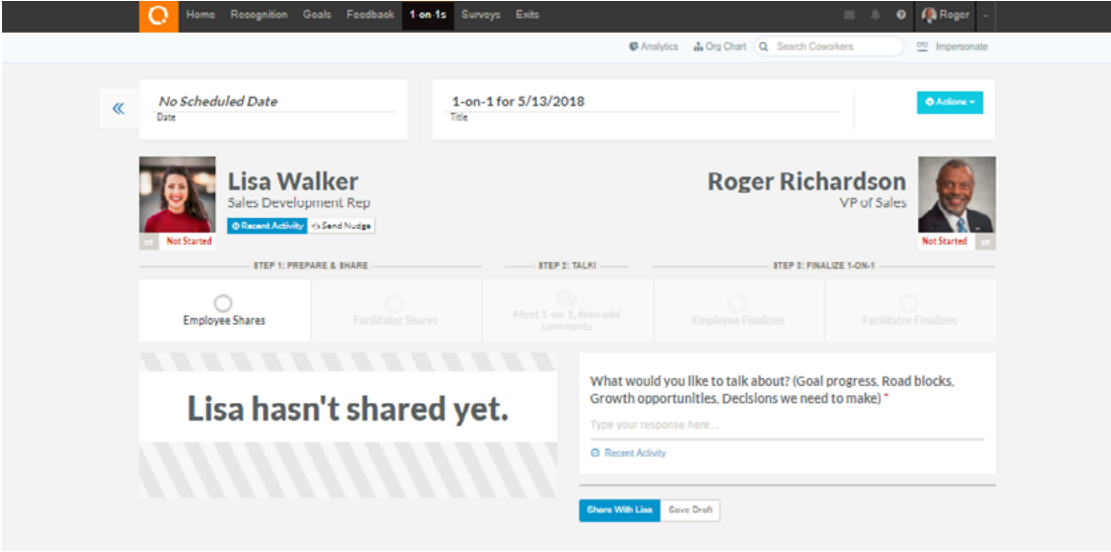
- **New Hire 1-on-1:** We recommend this 1-on-1 when a new employee joins the team, either a new hire to the organization or a member transferring from another team. This 1-on-1 helps the employee and manager get to know one another and start building a trusting relationship. This type of 1-on-1 also signals the manager cares about the employee.
- **Skip-level 1-on-1:** When employees have an opportunity to meet with their boss's boss, it helps them establish a trusting relationship, improves alignment on important topics, and can even be a form of showing appreciation for employees.
- **Performance Improvement 1-on-1:** When an employee fails to meet expectations, performs inconsistently or below average, or is not living out your organization's core values, a performance improvement 1-on-1 is an opportunity to discuss the issue, create a performance improvement plan, and agree upon next steps.

1-on-1 conversations are a great opportunity to tackle a variety of topics that are critical to employee engagement. The suggestions above are just the start! What other types of 1-on-1 conversations would benefit your managers and employees?

2 Build Your 1-on-1 Conversation Templates

After deciding the types of 1-on-1s that make sense for your managers and employees, it's time to build templates. Templates help managers and employees prepare for their 1-on-1 so the conversation is as effective as possible. Templates can either contain specific questions to prompt a more defined conversation or general questions that allow a manager and employee to prepare for a wide variety of 1-on-1 conversations.

The templates also support questions with scaled-responses (e.g. Below Average, Average, Above Average), which are sometimes used in performance-based conversations.



While you have complete control over the design process, Quantum Workplace also wants to make things super easy for you! You can select from our library of pre-built 1-on-1 templates, or these pre-built templates can inspire you to build your own.

Your Client Success Manager will initially walk you through this process so you know exactly what this step looks like and to ensure you're set up for success.

3 Decide Who Initiates the 1-on-1 Conversation

Quantum Workplace's 1-on-1 feature allows 1-on-1s to be prompted by:

1. HR or Admin users

This approach is commonly used for Goal-Setting, Performance, and Career Development 1-on-1s. Admins can schedule "cycles" where the entire organization or specific departments have 1-on-1 conversations launched in specific timeframes. This approach encourages these important conversations to take place in the desired timeframe.

- If continuous conversations are a well-established part of your organization's culture, or if you're looking to fully empower managers, consider having managers initiate these 1-on-1s instead of Admin users.

2. Managers

This approach is commonly used for monthly 1-on-1s that supplement the Admin-launched 1-on-1 conversations.

- Managers may also initiate Goal-Setting, Performance, and Career Development 1-on-1s if this approach is a better fit for your organization.

3. Employees

This approach is commonly used for spontaneous 1-on-1s, or any time an employee has a topic to discuss with his or her manager (e.g. an employee facing a life change who may need flexibility or an employee who received tough feedback from a peer or customer). This approach empowers the employee to vocalize challenges that impact him or her and breaks down perceived barriers of being able to meet with his or her manager.

Additional Features

Your Client Success Manager will walk you through all the functionality of the 1-on-1 feature, including all the bells and whistles. Here are a few specific capabilities and features worth noting:

- **Email Notifications:** managers and employees will receive email notifications when 1-on-1s are launched, shared, or archived to make it easy to know when action is needed in the software
- **Recurring (Scheduled) 1-on-1s:** busy managers that may forget to launch the 1-on-1 before it occurs (also known as all managers) can create auto-recurring 1-on-1s that auto-launch and remind them that they've got one coming up
- **Dashboard:** a simple, easily accessible view for managers and employees to see the upcoming and past 1-on-1s they've participated in
- **Recent Activity:** a convenient summary of goal progress, recognition, feedback, past 1-on-1s, and private notes the manager may keep that managers can review about each employee, prompting more effective 1-on-1 conversations
- **Analytics:** for Admin users to easily view conversations that are taking place inside the organization and details about them

We could go on-and-on about the bells and whistles, but we'll save some topics for the conversation with your Client Success Manager.

Prepare to Launch

It's important to prepare the end users of the 1-on-1 feature – your managers and employees. Quantum Workplace's strategic communication plan helps you think through important communication touchpoints during different phases:

- 1 Pre-Launch:** Announcing what 1-on-1s are, what the technology looks like, why your organization is taking this approach, and what your managers and employees should expect
- 2 Launch:** Announcements and how-to guides
- 3 After Launch:** Best practices and tips to drive usage

Speaking of best practices and tips, Quantum Workplace is continuously adding to our library of resources for your managers! Our Engagement Studio videos connect your managers to our QW experts. Some example videos include:

[1-on-1 Meeting Tips for Managers and Employees](#)

[The 1-on-1 Conversations Managers Should be Having \(Coming Soon\)](#)

[5 Must-Have Tips for Painless Performance Improvement Plan Conversations \(Coming Soon\)](#)

Your managers and employees can directly access these helpful resources in our software, and you're welcome to link to these resources if you want to share them with others.

Ready to get started? Us, too! Your Client Success Manager will walk you through next steps, and we're happy to answer any questions not covered for you in this guide.