

# HOW TO HAVE THE BEST ONE-ON-ONE WITH YOUR SALESPEOPLE



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# OVERVIEW

In this guide, you will learn precisely what a one-on-one meeting is, its importance, how often you should have them, the purpose, the biggest challenge, and what to cover during a one-on-one meeting.

You'll also get a free tool at the end to download and use in your next one-on-one meeting.

## WHAT ARE ONE-ON-ONES?

One-on-one meetings are held weekly and are a dedicated time for an employee and their leader to connect on work, career development, goals, and personal growth. One-on-ones are one of the most important ways leaders can engage and retain their teams.

According to Reclaim, one-on-one meetings had increased over 500% since before the pandemic, when professionals used to average just 0.9 per week.



**Have a question? Reach out to us at  
[info@pivotaladvisors.com](mailto:info@pivotaladvisors.com) or 952-226-3388.**

# WHY ARE ONE-ON-ONES IMPORTANT?

Fewer vehicles are more potent in driving desired behavior than the one-on-one meeting you have with each of your salespeople. This is the salesperson's best opportunity to get your undivided attention and focus on the items they may need assistance with.

It is also the best opportunity to provide focused and relevant feedback on items particular to that salesperson, typically not addressed in team meetings.

The one-on-one meeting allows you to tailor your attention to each salesperson, since each team member has specific strengths and opportunities, and each is likely motivated by different things. One-on-one meetings that are run well can effectively drive desired behaviors and motivate the salesperson.

However, if they are not well-defined or focused, they become a time-consuming task that provides little value to either participant. Here are some ways you can have the best one-on-one meetings with your salespeople.

Gallup has found that when managers provide weekly (vs. annual) feedback, team members are more motivated to do outstanding work and are generally more engaged.



## UNDIVIDED ATTENTION



## RELEVANT FEEDBACK



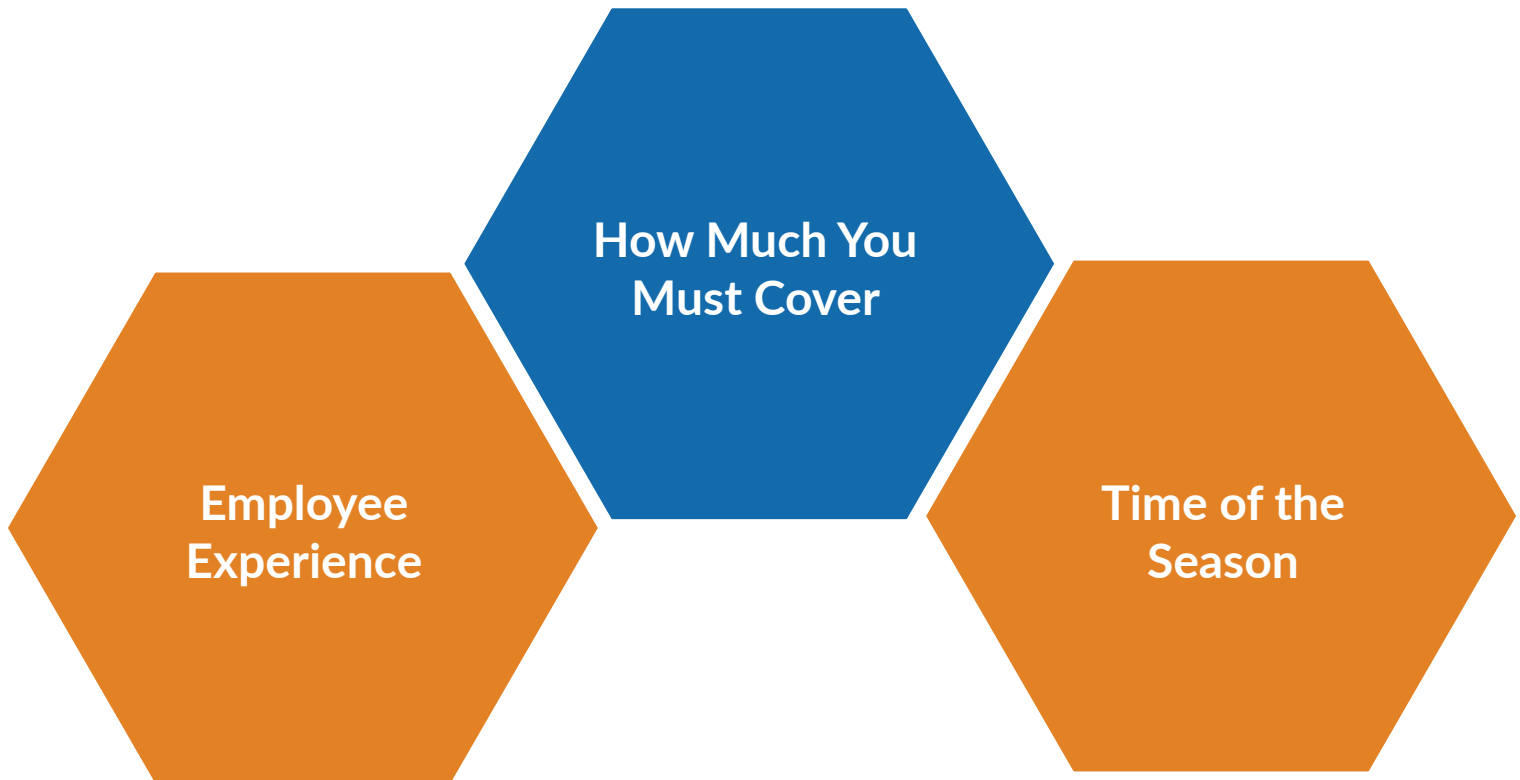
## MORE ENGAGEMENT

## HOW OFTEN SHOULD YOU HAVE A ONE-ON-ONE?

Although 30-minute weekly one-on-ones seem to be the most common choice, the length and frequency of your one-on-ones will differ for each leader-employee relationship.

Best practices aside, you need to find a cadence that works for you and your team members. Still, there are some rules of thumb you can consider.

When it comes to how long and when you'd like to have your one-on-one meeting, please consider:



**ACCORDING TO HYPERCONTEXT, 48.5% OF LEADERS  
HAVE WEEKLY ONE-ON-ONES**

# PURPOSE

## WHAT IS THE PURPOSE OF A ONE-ON-ONE MEETING?

The purpose is to increase effective communication between leader and employee, as well as to find and address things before they become larger issues. The content discussed will vary for each company, department, and individual.

WHEN ASKED WHAT THE PURPOSE OF ONE-ON-ONE MEETINGS ARE, MANAGERS REPORTED THE FOLLOWING:

70.4%



**ROADBLOCKS**

Understand and eliminate roadblocks.

60.7%



**PULSE CHECK**

Are they engaged, happy, upset?

53.6%



**STATUS UPDATE**

How are specific projects coming along?



# NUMBER ONE CHALLENGE

## WHAT IS THE NUMBER ONE CHALLENGE WITH ONE-ON-ONE MEETINGS?

According to Reclaim, on average, 42.4% of one-on-one meetings are rescheduled every week.

Rescheduling one-on-one meetings isn't always a bad thing. However, to be productive and collaborative, professionals need to be flexible in their schedules to accommodate priority changes, especially in sales.

There are also everyday work and life conflicts, and even time off, that can impact one-on-one meetings.

The problem is when rescheduling becomes the norm.

If a leader is responsible for providing guidance, feedback, coaching, and development to their team, you must prioritize the time you need with your team to help them be successful in their roles.

When rescheduling begins to impact a team's progress, it's time to look at protecting this time on your calendars and keeping to a consistent cadence.



## Three Things To Stay in Tune With When Conducting One-On-Ones.

# 1

### GOAL

Drive team member behavior and performance while providing individual accountability and motivation.

# 2

### FOCUS

Measure team member performance against established goals and standards and ensure that both parties agree.

# 3

### ROLE

Both parties must be clear on their expectations during these meetings.

## Understanding The Roles



### SALESPERSON

- Drives the meeting.
- Provides the data from CRM system/tools.
- Takes notes to record goals, activities, and M.I.T.s. (Most Important Things).



### SALES LEADER

- Listens.
- Provides feedback and positive reinforcement.
- Questions/challenges (does not direct) on things that could be done differently.
- Helps team member set goals for the next meeting.



# AGENDA

The key to a successful one-on-one meeting is the agenda. It may vary somewhat from company to company, but it is vital to have a defined agenda of things to be covered in your meetings.

## EXAMPLE ONE-ON-ONE AGENDA

1

### M.I.T'S

Review M.I.T's (Most Important Things – follow-ups and activities) set from the previous one-on-one.

4

### ROADBLOCKS

Consider what types of things got in the way and what can be done to ensure they don't get in the way again.

2

### REFLECT

Reflect on the successes the salesperson had and why they were successful.

5

### ASSIST

Ask in what areas they need help, and/or what skills, resources, etc., they may need.

3

### GOALS

Review goals and objectives (reporting of weekly activity and results).

Make sure that your one-on-one meeting stays focused on specific goals and objectives from the weekly reporting process and does not transition into a pipeline review and discussion about deal strategy – this happens often, but these topics should be handled in separate conversations.

## WE'RE HERE TO HELP

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There are many steps to one-on-one meetings, which can be overwhelming at times. We have worked with hundreds of companies struggling to find the right cadence. We are happy to help you too.

If you have questions about this guide or how you can be even more successful as a sales leader, don't hesitate to get in touch with us.



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# ONE-ON-ONE AGENDA TOOL

## AGENDA

1. What were the Most Important Things (MITs) from last time?

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2. Were the goals accomplished? Why? Why not?

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3. What successes did you have? Why were you successful?

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4. What types of things got in the way? What can we do to insure they don't get in the way again?

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5. In what areas do you need help from manager? What skills, resources, etc. do you need?

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6. Are there any other concerns, feelings or conflicts that may need to be discussed?

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7. What are your goals and specific actions? What are you going to do before the next one-on-one?

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8. Summarize and agree