

## HOW TO USE *THE YOU MATTER HERE CONVERSATION PLANNER*



INDIVIDUAL



30 MIN



QUARTERLY

Go beyond traditional “stay interviews” and let your employees know they matter by engaging them with *You Matter Here* questions. Use these questions to grow your relationship and improve your employee’s experience while gathering valuable insights that will help you lead from a place of connection and ensure your employees feel noticed, needed and significant.

This tool is designed to help you connect with employees, express gratitude, review measurables, uncover career goals and assess current levels of engagement. Build these questions into your one-on-one meetings with direct reports over time, and resist the urge to save them for an annual review.

### **STEP 1: Pre-Meeting Reflection**

As you prepare for a one-on-one conversation with your direct report, note specific examples of their recent contributions that you can highlight as well as the gratitude you would like to express. Prepare to ask about their well-being and life beyond work. Be open to hearing about their life’s milestones and challenges, and be ready to share what’s going on in your own life as well. Communicating with care and authenticity will strengthen feelings of trust in your relationship.

### **STEP 2: Create Your Conversation Roadmap**

Before you meet, review all nine questions in this tool. Say them out loud, and if needed, re-write the questions to fit your voice. Is there a question missing? Write your own.

Check the quarter in which you foresee the opportunity to ask each question. Use organizational events and schedules to determine timing. For example, avoid asking how you could be a better leader right before you leave for a two-week vacation, or asking how to make work more enjoyable after a challenging meeting or project.

### **STEP 3: Have the Conversation**

Try it out! Incorporate one or two questions into your next one-on-one conversation. Add it into your conversation early on, without labeling the question or calling attention to its purpose. Prepare to answer the question yourself, too. Practice active listening and resist the urge to move on too quickly.

### **STEP 4: Take Note of Highlights**

After your one-on-one is over, make note of what you discussed. Capture the things that stood out to you. Ask yourself, “What follow up action is needed by me? By the individual?” Be sure to revisit the tool at least quarterly to reaffirm what you’re asking and when. Reference your notes from past one-on-ones so you can build on each conversation. Be flexible; change your plan as things change within your organization, team or roles, and be prepared; these conversations may unveil new challenges and unrealized opportunities.

LEADER NAME:

EMPLOYEE NAME:

YEAR:

Use this planner on an annual basis to increase engagement with each of your direct reports during your one-on-one meetings.

## PRE-MEETING REFLECTION

What is a specific attribute you are grateful to them for bringing to your team? Express gratitude.

How have they added value this week? Recognize and share feedback.

What's going on in their personal life? Reflect on celebrations, heartaches and everyday life.

## YOU MATTER HERE QUESTIONS

1. What keeps you working here at our organization and in your role?

How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
--------------------	--	---------------------	----	----	----	----

Discussion Notes & Follow Up Actions:

2. What is something in your current role you wish you had more/less of?

How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
--------------------	--	---------------------	----	----	----	----

Discussion Notes & Follow Up Actions:

3. Have you been given the freedom to be yourself and do things your way in your role?

How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
--------------------	--	---------------------	----	----	----	----

Discussion Notes & Follow Up Actions:

4. Which of your skills are you not using in your current role?

How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
--------------------	--	---------------------	----	----	----	----

Discussion Notes & Follow Up Actions:

5. How can I make your work more enjoyable? More fulfilling?						
How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						

6. What is an area you would like to learn and grow in?						
How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						

7. What opportunity would interest you enough for you to step away from your current role?						
How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						

8. What is the single most meaningful action I could take as your leader?						
How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						

9. If you were going to coach me on one thing to make me a better leader, what would it be?						
How will I ask it?		When will I ask it?	Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						

## YOUR QUESTIONS

Write Your Own Question Here:						
When will I ask it?			Q1	Q2	Q3	Q4
Discussion Notes & Follow Up Actions:						