
SAMPLE FIRST ONE-ON-ONE MEETING AGENDA

JONES CONSULTANTS, INC.

Location: Jones Consultants' Headquarters, 1234 Main St. Los Angeles, CA 91111

Date: January 12, 2021

Time: 11:00 am

Attendees: Kathleen Jones (supervisor) and Andrew Cruz (employee)

TOPICS TO BE DISCUSSED:

I. PERSONAL BACKGROUND

- a. Where did Andrew grow up?
- b. What schools did Andrew attend?
- c. Who does Andrew live with full-time at home?
- d. What are Andrew's hobbies outside of work?

II. COMMUNICATION

- a. Does Andrew prefer email, text message, or phone calls as primary communication?

III. AVAILABILITY

- a. Is Andrew only available M-F 9-5, or does he have any availability on nights and weekends as well?

IV. GOALS AND ASPIRATIONS

- a. What are Andrew's goals in his new role as Secretary, and what are his longer-term career goals? How does he see this position driving him towards those career goals?

V. TYPES OF WORK

- a. What special skills does Andrew have that can suit him as Secretary, as well as in other ways for the company?

- b. What responsibilities is he comfortable taking-on right away, and what responsibilities would he like more training for?

VI. FREQUENCY

- a. How often would Andrew like to have one-on-one meetings with Kathleen?