

# Sample Agenda Templates

## First Touchpoint

### Issues (~10 minutes)

- When have you felt frustrated in your first 2 weeks here?
- What feels unclear? (e.g., Do you feel you have enough context about the university?)
- How clear is “success” for you for the next 3 months, next 6 months, and next year?
- Are there any decisions you’re hung up on?
- Observations about the team and/or organizational culture?
- When and how frequently would you like us to have Touchpoints?

### Feedback (~10 minutes)

- Would you like more or less feedback on your work?
- Would you like more or less direction from me?
- How is the workload?
- What aspect of your job you would like more help or coaching?
- What about my management style can I improve?

### Career direction (~5 minutes)

- If you could be proud of one accomplishment between now and next year, what would it be?
- What’s one thing we could do today to help you with your long-term goals?

### Next steps / takeaways (~5 minutes)

## Getting Perspective

### Feedback + observations (~30 minutes)

- Would you like more or less feedback on your work?
- Would you like more or less direction from me?
- How is the workload?
- What aspect of your job you would like more help or coaching?
- What about my management style can I improve?
- What aspect of my job do you think I can do a better job?
- Any observations about work style preferences?
- Any feedback you've been hearing from the team?
- Thoughts on feedback amount, frequency, delivery, etc.

### Takeaways / next steps (~5 minutes)

## Exploration 🌐

### Observations (~15 minutes)

- When have you felt frustrated in the past few weeks?
- What are your biggest time wasters?
- Are there any decisions you are hung up on?
- Any observations about the team and/or organizational culture?
- Any decision or direction that wasn't clear that you might want context about?

### Input (~15 minutes)

- I would love to get your advice on how to handle \_\_\_\_\_.
- Do you think we are headed in the right direction as a team?

### Takeaways / next steps (~10 minutes)

## Coaching conversation 🗨️

### Goals (~15 minutes)

- What short and long-term goals have we agreed to?
- How have things gone since we last spoke?
- What future goals do we need to discuss?

### Obstacles (~15 minutes)

- What is standing in the way of success?
- What have you noticed getting in your way?
- What can I do to help you overcome these obstacles? What can you do?

### Opportunities (~15 minutes)

- What recent project or accomplishment are you proud of that people don't know about?
- Do you feel you're growing toward where you want to be?
- What could we do to make this your dream job?

### Decisions (~15 minutes)

- What actions will you take before our next meeting?
- What actions will I take before our next meeting?
- What other big decisions do we need to make today?

## Transition to remote work 👍

### Issues/Concerns (~10 min.)

- Do you have the tools and resources to do your job well remotely?
- How does the frequency and channels of communication feel to you? Do you feel overwhelmed with too much information, or in the dark about certain things? Is there anything you wish you had more communication about?
- What if any part of the work do you feel stuck?

- Do you feel you are being set up to fail in any way? Are my expectations realistic? What am I asking for that we should adjust so it is more reasonable?

#### **Feedback (~ 10 min.)**

- What have you noticed that has been positively or negatively affecting our dynamic in being able to get work done? Any meeting, process or task we should reconsider or get rid of as a result?
- Has anything about my management style irked you or rubbed you the wrong way? Do I follow-up too frequently with you, not giving you space to breathe?

#### **Team Outlook (~10 min.)**

- Would you say you are feeling optimistic, pessimistic, or somewhere in the middle about the team's future?
- What can we communicate more often and more transparently about to help reduce any anxiety around the team's future?

## **Pre or Post Evaluation**

#### **Reflections on the past year (~30 minutes):**

- When you consider this past year in full, how do you feel about your personal progress? How about the progress the team made?
- How did the pace of work and the pace of progress feel across the year?
- When did you feel most proud to be a part of the team this past year?
- When did you feel most discouraged last year?
- Who's help or support on the team have you been most appreciative of?
- What do you think has been the most significant area of growth for you? A time where you thought, "I really learned something!"
- In what ways has our work relationship changed over time? In what ways have we made positive progress?

#### **Looking ahead (~25 minutes):**

- What can I do better in the upcoming year to be the best manager possible?
- In what ways do you want to stretch and grow in the upcoming year?
- What do I need to pay closer attention to as a leader?
- How can we better challenge and support each other in the upcoming year?

#### **Takeaways and next steps (~5 minutes):**

- What are we both taking away from this conversation?
- Are there any next steps each of us needs to take for the upcoming year?

## **Last Touchpoint**

#### **Offboarding questions (~30 minutes):**

- Has all of the knowledge transfer been completed?
- Is there anything we should be aware of as we take over your responsibilities?
- If we could improve in any way, how would we do it?

- Did the job live up to your expectations?
- What was the most enjoyable part of your job?
- What qualities and skills should someone have to be successful in your role?
- Who do you feel is doing an outstanding job on the team?