



From Transactional to Transformational

One-on-One Meetings that Really Work

Recast Leadership Cohort, July 2024

 **BILL ZIPP**

Recast Leadership Cohort

Group Meetings *Monthly*

Focused on a critical leadership topic, like executive presence, one-on-ones, team member motivation. Each topic has field work flowing from the group session.

One-on-One Coaching *Between Meetings*

Focused on applying the content of our group meetings to your specific context and individually working through the field work that is assigned in the group meeting.

Group Meetings: Monday, July 15; Monday, August 12; Monday, September 16 all at 1:00 PM Pacific

The One-on-One Priority

There's lots to do as a busy frontline manager, and some things inevitably take a lower priority.

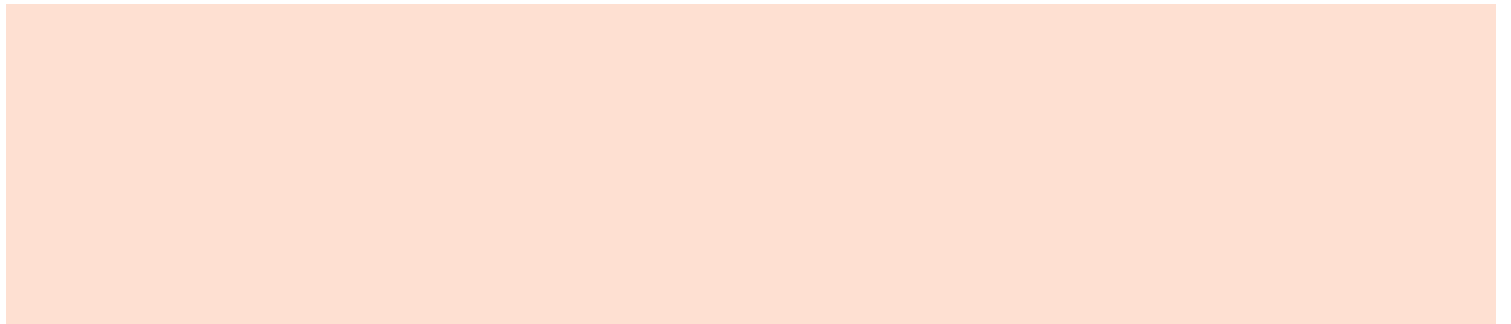
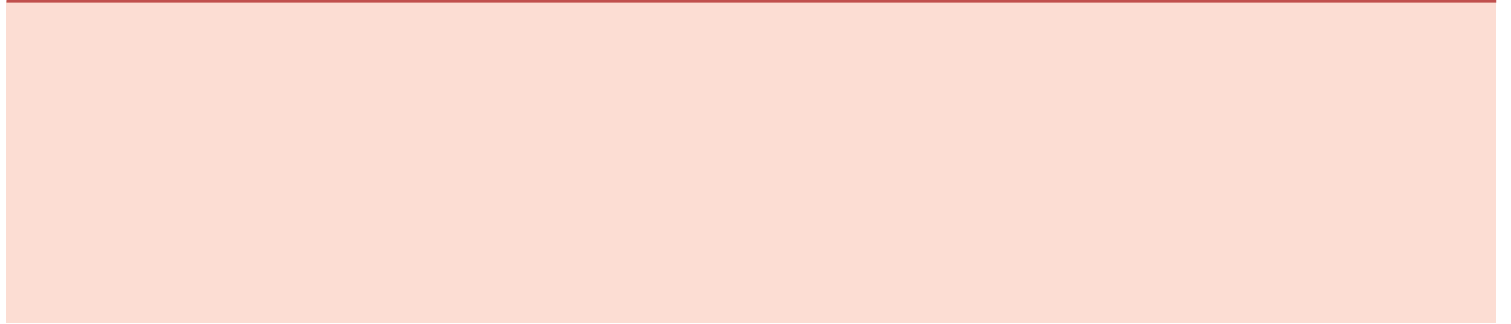
Don't let your one-on-ones be one of those things!

Consistent, weekly one-on-ones with team members are the single most effective way to to achieve world-class results as a leader.

**From
Transactional to
Transformational**

Transactional

Transformational



From Transactional to Transformational

Transactional

Transformational

Primary Focus:
Deals, Dollars, Details

Intense pressure to drive
towards a number

The **frontline manager**
does most of the talking

From Transactional to Transformational

Transactional

Transformational

Primary Focus:
Deals, Dollars, Details

Primary Focus:
Development

Intense pressure to drive
towards a number

In light of the number,
work on the process

The **frontline manager**
does most of the talking

Team members do most of
the talking



How to Conduct Transformational One-on-Ones



How to Conduct Transformational One-on-Ones

STEP ONE: The Agenda



Target Half Marathon Time:

2 hours and 15 minutes

Weekly Running Workouts:

Long runs

Tempo runs

Interval workouts

Recovery runs

Core exercises

Performance Goals

Process Goals

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Performance Goals

Total output by month, quarter,
and year

Process Goals

Output activities by day, week,
and month

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Output activities by day, week,
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Set as a core metric each year

Repeated over and over again

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Process Goals

Total output by month, quarter, and year

Output activities by day, week, and month

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What your team members need to achieve

How your team members will be able to achieve it

Performance Goals

Process Goals

Total output by month, quarter,
and year

Output activities by day, week,
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Set as a core metric each year

Repeated over and over again

What your team members need
to achieve

How your team members will
be able to achieve it

Target marathon time

Weekly running workouts

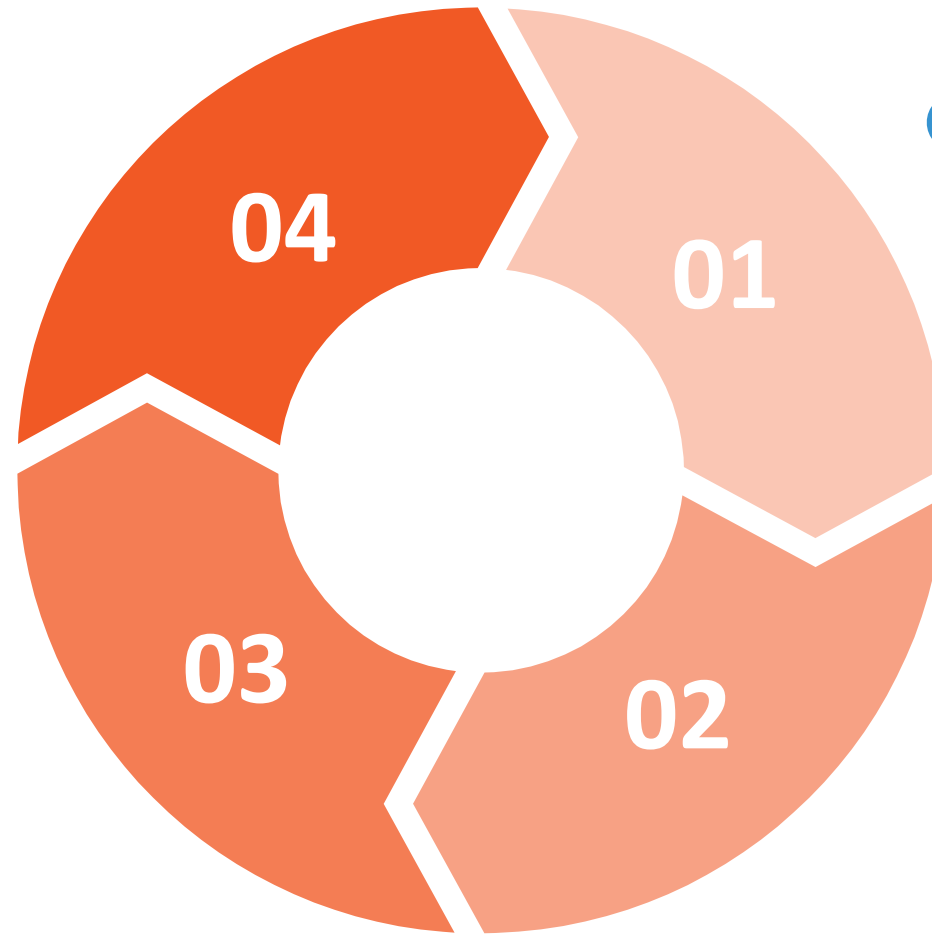


How to Conduct Transformational One-on-Ones

STEP ONE: The Agenda

STEP TWO: The Flow

One-on-One Meeting Flow



● **Progress**

The focus here is on the *past* and the *future*.

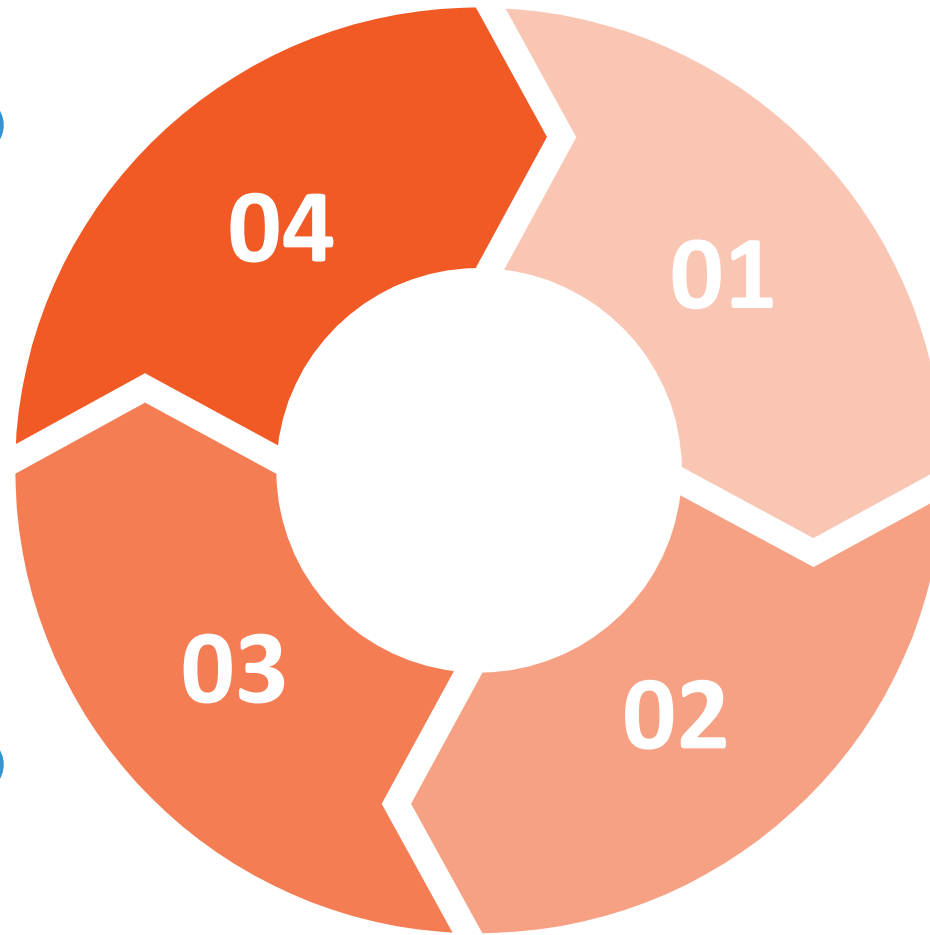
● **Plans**

One-on-One Meeting Flow

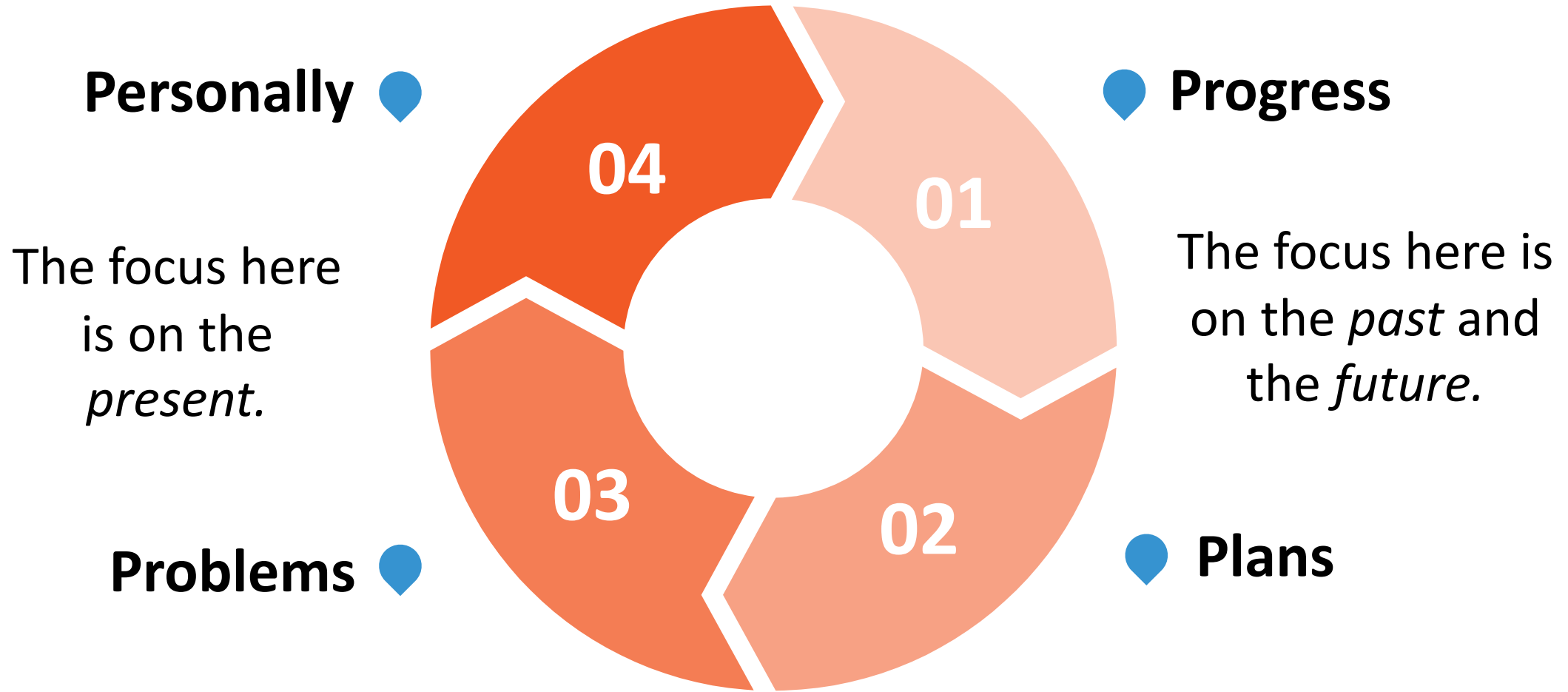
Personally ●

The focus here
is on the
present.

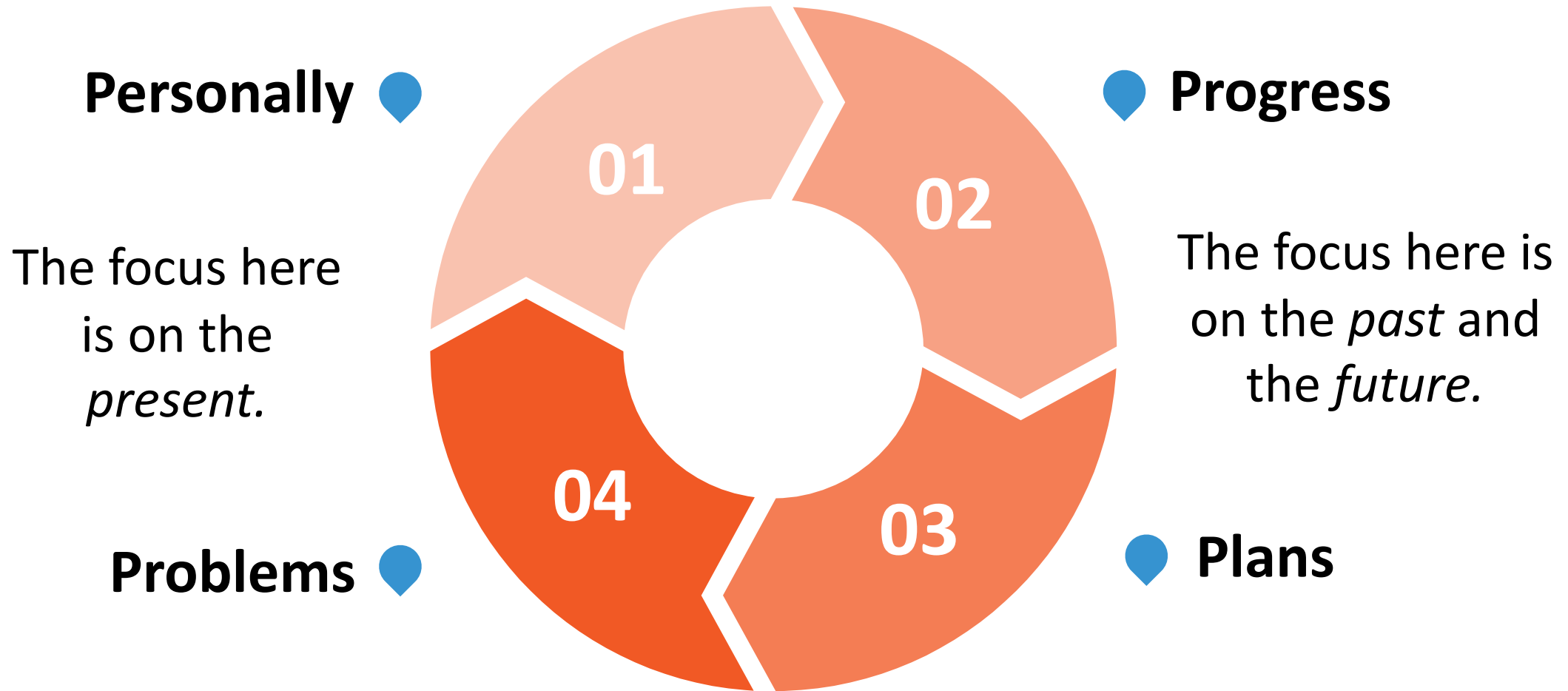
Problems ●



One-on-One Meeting Flow



One-on-One Meeting Flow





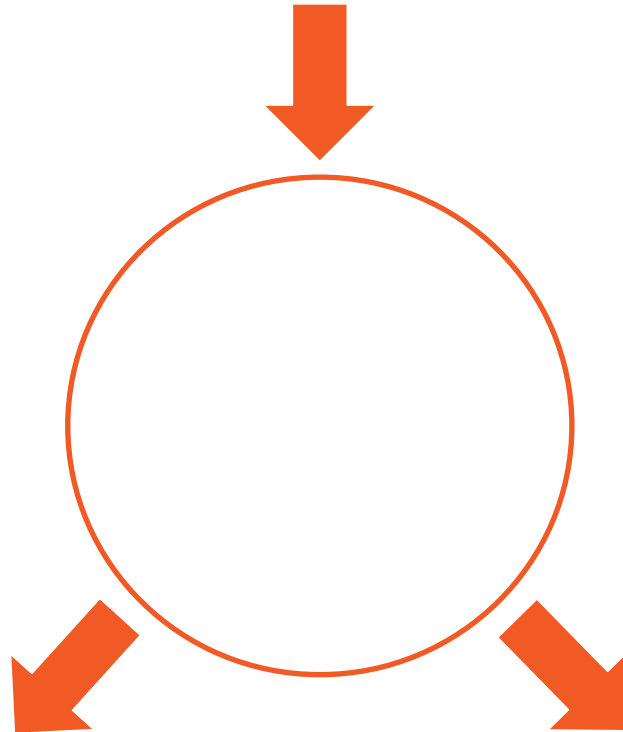
How to Conduct Transformational One-on-Ones

STEP ONE: The Agenda

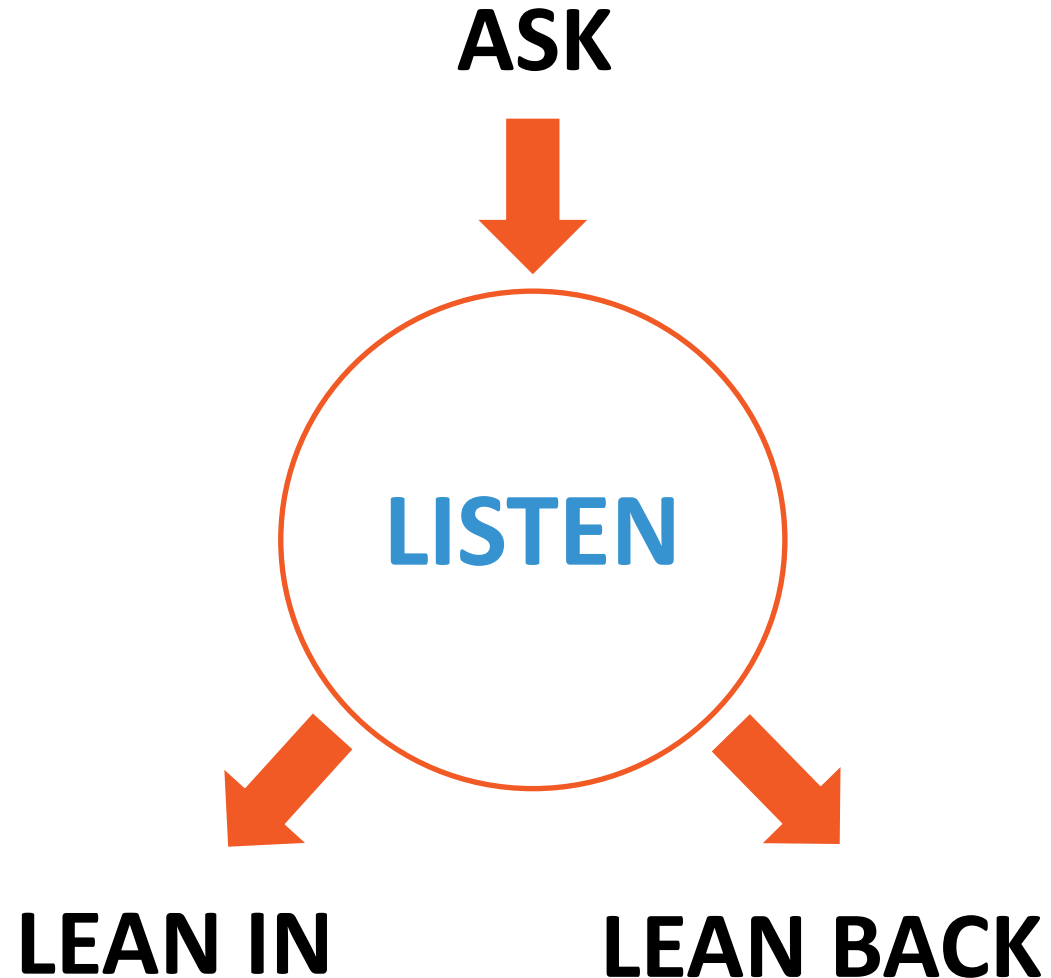
STEP TWO: The Flow

STEP THREE: The Conversation

How to Have a Coaching Conversation

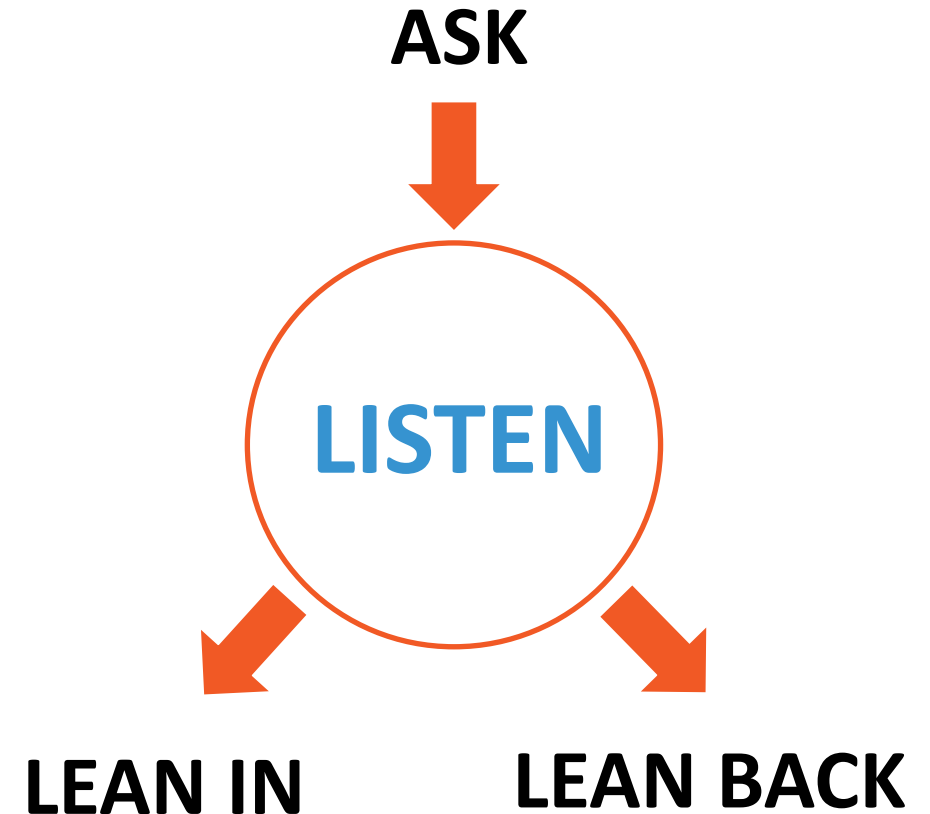


How to Have a Coaching Conversation



How to Have a Coaching Conversation

- Pose meaningful, thoughtful questions that deepen understanding of the process at hand.
- Pay close attention to the answers you receive.
- *If a team member is genuinely stuck, **LEAN IN** with direction, instruction, and specific steps of action, checking for understanding.*
- *If a team member is not stuck, **LEAN BACK**, asking more questions, reflecting back what you hear, and helping this person hear their own voice.*
- Repeat this practice over and over again in your one-on-ones.





“The only think I
do in music is
listen. Listening
is the most
important
thing.”

**Duke Ellington and His
Band, Circa 1956**



How to Conduct Transformational One-on-Ones

STEP ONE: The Agenda

STEP TWO: The Flow

STEP THREE: The Conversation

STEP FOUR: The Follow-Through

One-on-One Follow Through on Two Tracks

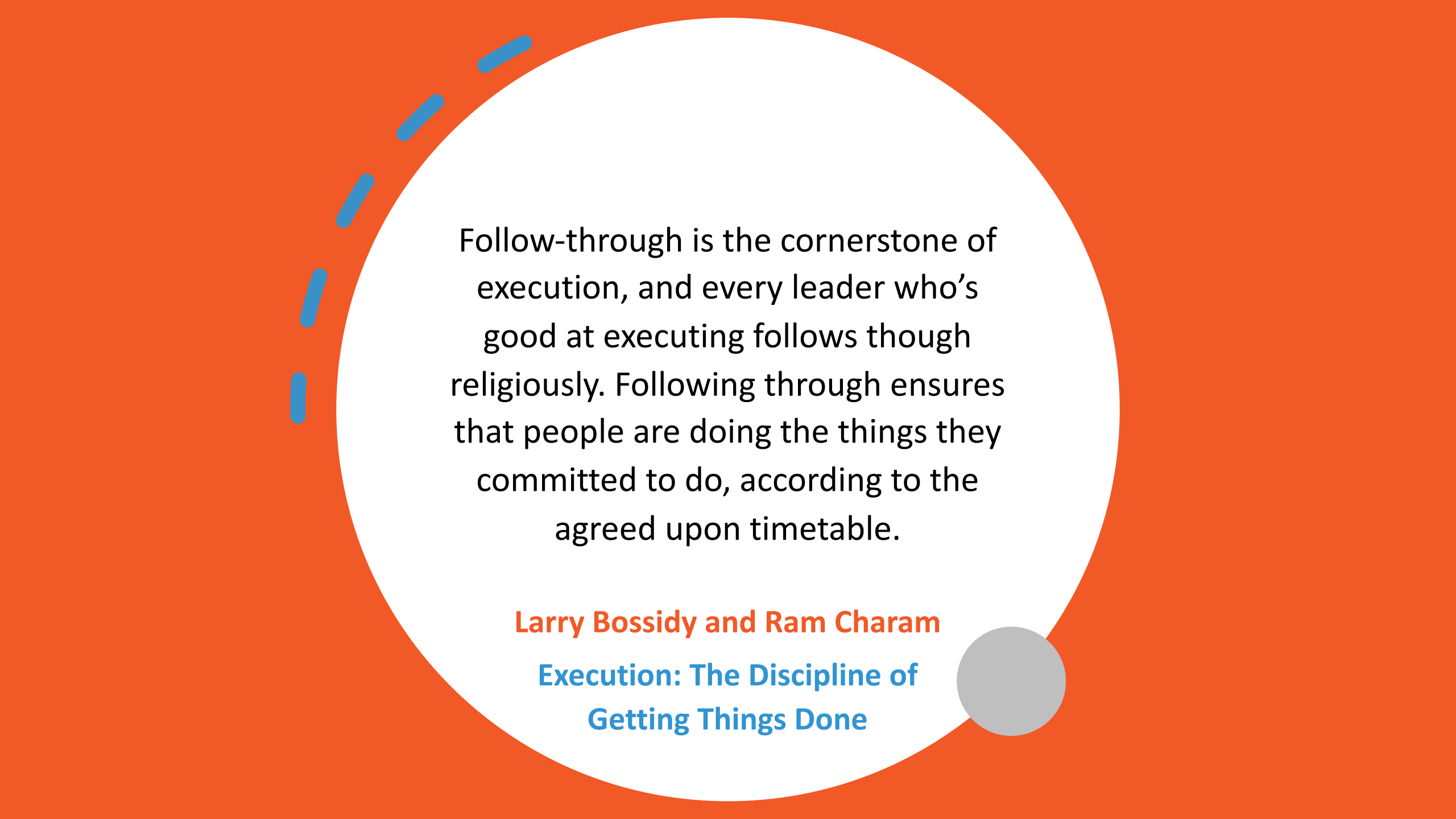
The Team Member Track:

Take your own notes but have your team members send a summary of **Progress** and **Plans** within the day.

The Frontline Manager Track:

Pay special attention to **Problems** and how a rep is doing **Personally**, removing the former and remembering the later.





Follow-through is the cornerstone of execution, and every leader who's good at executing follows through religiously. Following through ensures that people are doing the things they committed to do, according to the agreed upon timetable.

Larry Bossidy and Ram Charan

**Execution: The Discipline of
Getting Things Done**



How to Conduct Transformational One-on-Ones

STEP ONE: The Agenda

STEP TWO: The Flow

STEP THREE: The Conversation

STEP FOUR: The Follow-Through

STEP FIVE: The Cadence



Monthly One-on-Ones

Fewer meetings, but severely limits rep development. If you skip one, you could miss the entire quarter.

Bi-Weekly One-on-Ones

Fewer meetings, which could work for more seasoned reps, but not newer ones. If you skip one, you could miss the month.

Weekly One-on-Ones

More meetings, but you can get them down to 30 minutes. For more seasoned reps, you can skip the last meeting of the month.

the
ULTIMATE
SALES
MANAGER
PLAYBOOK

Becoming a
Successful Sales
LEADER

BILL ZIPP

Recast Leadership Cohort

July 15, August 12, and September 16

Do these three things:

1. Complete the field work at the link sent to you by email.
2. Schedule your coaching session with Bill via Calendly.
3. Review the eBook on having effective one-on-ones.

Your Dedicated Web Resource Page:

<https://billzipp.com/recastleadershipcohort/>



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