

One-To-One - Prep Worksheet

For meeting on _____



The numbers, for the month of _____

Key Indicator	Current Results	Trend / Direction / Issues / Challenges
Revenue Current Month		
Revenue Year-to-Date		
Gross Margin % Current Month		
Gross Margin % Year-to-Date		
SG&A \$ / % Current Month		
SG&A \$ / % Year-to-Date		

Progress on this year's Goals and Accountabilities

Business	Personal	Health & Fitness
1.	1.	1.
2.	2.	2.
3.	3.	3.

Overall, my progress is _____.

Progress on Strategic Agenda so far this year

Agenda Item	Due Date	Progress / Issues / Challenges

What's going on in my business that I need to talk about?

(Financials, sales, marketing, customer situation, competition, management team, people, culture, accountability, significant opportunity or threat, my role and results I'm getting, most important priorities for next 30-90 days.)

What's going on in my personal life that I need to talk about?

(Quality time with significant others, friendships, leisure time pursuits, personal financial, health & fitness, spiritual, personal development, my role and results, most important priorities for the next 30-90 days.)

<p>What I want most from this One-To-One is...</p>	
<p>The most important think I need to learn in the next 30 days to be more effective in my work and/or personal life is.... Why is it important? What's my plan? What will success look like?</p>	
<p>Updates on topics we've been discussing over the past several months...</p>	

