

Quarterly One-on-One Template

Before the Meeting: Set the Foundation

A strong quarterly one-on-one starts before you get in the room. Both participants should take time to reflect on the past three months:

- What progress was made?
- What didn't go as planned?
- What patterns are emerging?

Review notes from previous one-on-ones, goals, and any performance feedback. Quarterly meetings are most valuable when they build on past conversations — not start from scratch.

Come prepared with specific examples, not general impressions.

During the Meeting: Stay Focused

Reflection on the Past Quarter

Start by grounding the conversation in a shared understanding of how things went.

- How would you describe the past quarter overall?
- What accomplishments are you most proud of?
- What progress did you make toward your goals?
- What didn't go as expected, and why?

This section helps identify patterns — not just isolated wins or misses.

Performance and Impact

Move beyond activity and focus on outcomes.

- Where did you have the biggest impact this quarter?
- Which strengths showed up most consistently in your work?
- Were there areas where performance fell short of expectations?
- What feedback have you received, and what stands out?

Quarterly conversations are a natural place to connect day-to-day work to broader impact.

Challenges and Support

Dig into what made the quarter harder than it needed to be.

- What were the biggest challenges or obstacles you faced?
- Where did you feel stuck or slowed down?
- What support, resources, or clarity would have helped?
- What can I do differently to better support you next quarter?

This is where you uncover systemic issues — not just individual ones.

Growth and Development

Quarterly one-on-ones are especially important for career development conversations.

- What did you learn over the past three months?
- Which skills have you developed?
- Where do you want to grow next?
- Are you getting enough opportunities to stretch and develop?

Regular one-on-ones are a key driver of growth and engagement, especially when they include forward-looking development conversations.

Career Direction and Long-Term Goals

Zoom out even further.

- How do you feel about your current role and trajectory?
- What are your longer-term career goals?
- Has anything changed in what you want next?
- How can we better align your work with those goals?

This section ensures the conversation isn't just about performance — it's about direction.

Looking Ahead: Next Quarter Priorities

Shift focus to the future.

- What are your top priorities for the next quarter?
- What does success look like?
- Are there any anticipated risks or challenges?
- How do your goals align with team and company priorities?

Quarterly planning helps maintain alignment as priorities evolve.

Feedback (Both Directions)

Manager → Employee

- What are you doing particularly well?
- Where should you focus to improve next quarter?
- What should you start, stop, or continue doing?

Employee → Manager

- What's been helpful in how I've supported you?
- What could I do differently or better?
- Where do you need more clarity, direction, or autonomy?

Consistent, two-way feedback is one of the most valuable outcomes of a one-on-one.

Team and Organizational Context

Quarterly is a good time to surface broader themes.

- How are things going within the team?
- Are there any collaboration or communication challenges?
- What feels unclear about team or company direction?
- What should we address to improve how we work together?

Wrap-Up and Action Items

End with clarity and accountability.

- What are the key takeaways from this conversation?
- What actions will each of us take next quarter?
- What needs to be followed up on — and by when?

Put this template into action

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The dashboard screenshot shows a 'CURRENT LEVEL' card with a green progress bar, a 'NEXT LEVEL' card with a blue progress bar, and a main dashboard with an 'AVERAGE' of 4.5 (up 0.5), 'PUBLISHED' count of 48 (up 5), and a line chart showing trends. A legend at the bottom indicates 'Black or African American' and '+20 SELF-EFFICACY'.