



1-2-1 conversation record template

This template supports regular, meaningful 1-2-1 conversations – helping managers and employees stay aligned, build trust, and track progress over time. It's also a helpful record if issues arise later.



Note: This is not a formal performance or disciplinary record unless explicitly stated.

Employee name:

Job title:

Manager name:

Date of conversation:

Preparation (for manager)

Any key topics or updates to cover in this session?

Purpose of this 1-2-1

E.g. regular check-in, project review, development discussion, wellbeing catch-up.

Key points discussed

Summarise main topics. Include updates, achievements, challenges, and any context.

Performance and objectives

How is the employee progressing against goals or expectations?

Use the table below to track progress against current objectives. Use the RAG status to highlight how each is going. **Example:**

Objective	Progress summary	RAG status	Support needed or next steps
e.g. Improve customer response times	Response time reduced by 15% this quarter	Green - On track or completed	Continue current approach
e.g. Complete training course	Slight delay due to workload	Amber - Some progress, but risk of delay or issue	Adjust deadlines or offer study time
e.g. Reduce delivery errors	Not yet started	Red - Off track, needs attention	Schedule team meeting

Fill in the below:

Objective	Progress summary	RAG status	Support needed or next steps

Development and aspirations

Any career goals, training interests or areas to explore? Note down updates, progress and actions or next steps.

Wellbeing and workload

Use this space to note how the employee is feeling, how their workload is impacting them, whether they need any support and any action that needs to be taken.

Some prompts to guide the discussion:

- How are you feeling at work and outside of it?
- What's your current workload like?
- Is anything affecting your energy or focus?
- Do you feel supported in your role?

Notes:

Feedback from employee

Did the employee share feedback or raise concerns?

Summary of all agreed next steps

List clear, actionable steps – for both the employee and manager. Include deadlines or follow-up actions.

Follow-up from previous 1-2-1 (if applicable)

Use this space to record anything else discussed as a follow up to a previous 1-2-1. Have previous actions been completed? If not, why?

Date of next 1-2-1

Schedule the next 1-2-1 and record the date here.

Reflection for manager

Record any relevant thoughts, reflections or information from the 1-2-1 here. Consider what went well, anything to do differently next time and if you require any support.