BLUEPRINT

How to Structure your 1:1 Meeting (REKS)

1:1 Individualized Coaching

As a coach, your direct reports will look to you for guidance on how to level up their careers as well as their current job performance. The most loved managers are able to find the right balance of focusing on performance and development.

The secret to great 1:1 meetings is being prepared, insightful, and efficient. One of the best ways to gain efficiency is to discuss certain topics with the appropriate frequency. Routine and structure build trust, but discussing career development opportunities every week may not leave enough time to tackle week-to-week performance issues.

Vary the topics you need to cover in 30- to 60-minute meetings throughout the month. Use your 1:1s to build a customized plan to which both you and your team feel accountable.

REKS Coaching Framework

REKS is a coaching framework you can use to help your direct reports succeed in their roles. It enables you to coach the key metrics that ultimately lead to their success. REKS stands for the following:

Results | **Effort** | **Knowledge** | **Skills**

Each rep's REKS goals should be established and communicated regularly. If changes are made to these goals, they should be clearly articulated.

REKS Definitions

Results

The specific and measurable outcome of their efforts. Depending on the role (e.g., inbound, outbound) these can include discovery calls, meetings held, opportunities created, deals closed, revenue closed, etc.

Effort

The defined, specific, and measurable activities that lead to the results required. This can include calls made, emails sent, social messages sent, events attended, leads converted, and other input activities that are leading indicators of results.

Knowledge

Formal knowledge encompasses things such as the sales process, product knowledge, persona profiles, industry context, and recognition of compelling events that are catalysts for purchasing your solution.

Skills

The core skills necessary to execute on the knowledge. This can include the ability to run a discovery call, effectively demo a solution, handle objections, write a compelling email, or trade during the close phase.

Review

Collate and review the data for the agreed-upon previous time period, and compare performance over time.

How to prepare:

- Obtain the required data from relevant data sources

Analysis

Analyze the data to hypothesize any potential challenges or opportunities. Leverage the REKS decision tree (see page 4) to diagnose the rep's current performance and understand their issues:

1. How does this compare to their historical performance?
2. If they continue on the current trajectory, will they achieve their goals?

How to prepare:

- Leveraging the rep's data, understand the path that your conversation should follow

Agenda

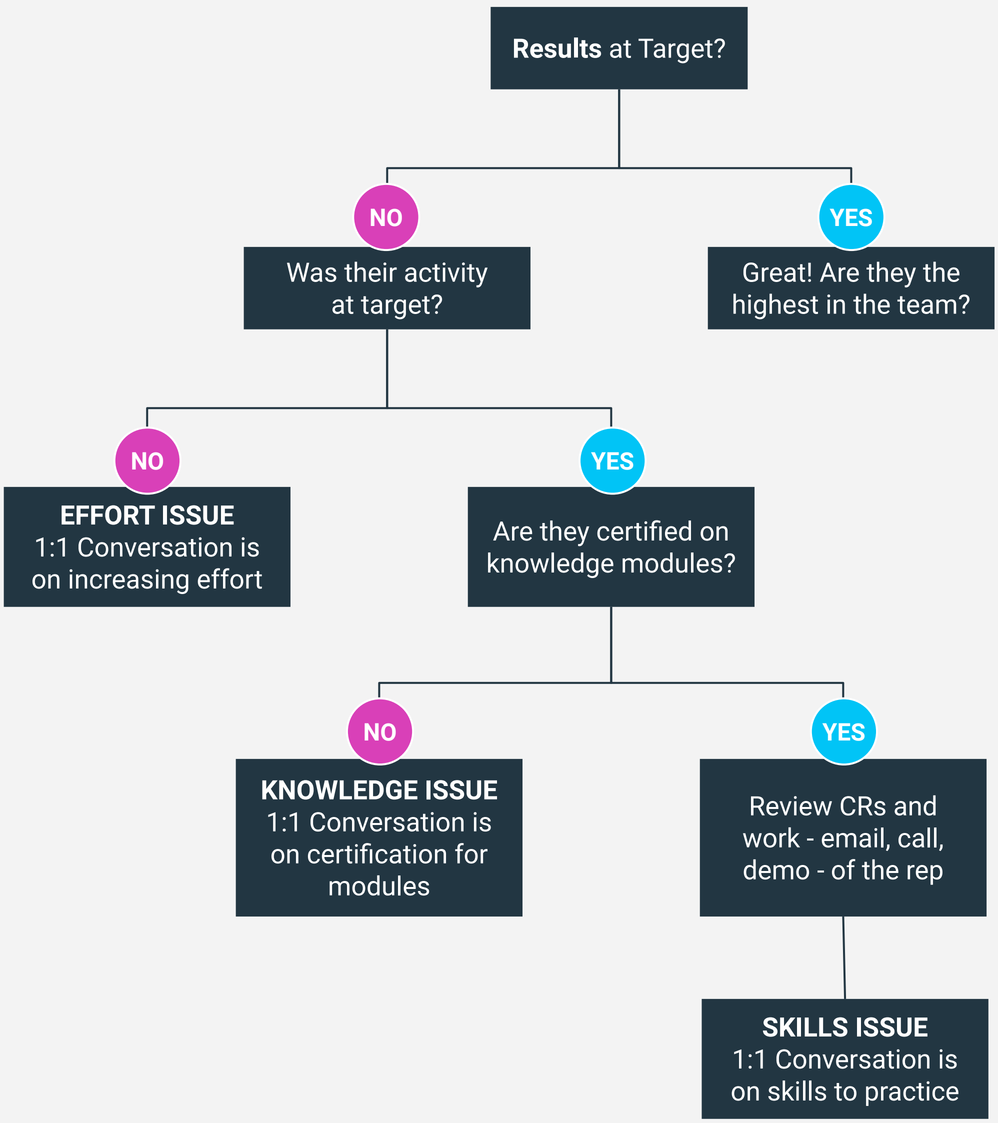
Set a clear agenda for your 1:1 meeting:

1. Open the meeting with clear goals and time objectives
2. Review the actions from last week
3. Discuss REKS analysis
4. Have growth conversation
5. Create an action plan
6. Set actions with completion dates

How to prepare:

- Send the agenda ahead of the meeting
- Prior to the meeting, request any necessary information

REKS Decision Tree



Leverage the REKS decision tree to diagnose the rep's current performance and understand their issues.

REKS Conclusion

Once you diagnose their performance, ask two questions:

1. What are you going to do more or less of?
2. How are you going to do that differently?

Use the REKS decision tree as a coaching opportunity; this is not the time to tell people WHAT to do.

Follow the Socratic method and ask them HOW their actions are going to help them achieve their goals.

How to prepare:

- Form a hypothesis of what the rep needs to do more or less of — and what they'll do differently

Growth Conversation

1:1s can be repetitive, so you can't focus solely on the rep's performance against REKS. You need to support their career growth to build trust and enable them to succeed. Each week should have a different growth focus. For example:

PRO TIP: *Align the velocity of these conversations with the velocity of the role. For example, if you're in a high-velocity environment, these conversations should happen regularly. With mature field sales reps, they should be spread out over the quarter.*

Week 1	**Business plan review**	The rep is accountable for reviewing their previous month's performance, outlining goals for the following month, and creating a plan to execute. You should challenge the rep, clear any obstacles, and coach them toward a positive result.
Week 2	**Pipeline review**	The rep presents their pipeline, with the manager reviewing and challenging opportunities as required.
Week 3	**Skills development**	Identify any gaps in the rep's skills. Dedicate time to educating them on those gaps and building a plan to bridge them.
Week 4	**Career growth**	Work with the rep to define personal and career goals. Then collaborate to map their current skills and abilities against the required skill sets. Prioritize those skills and goals to create an action plan.

Action Plan

Once a plan has been decided for REKS and growth conversations, ask your reps to identify the actions they're going to take and set realistic dates:

- **Check:** "Are these targets achievable?"
- **Ask:** "How can I help you to achieve these goals?"
- **Agree:** What happens if you don't achieve these goals in the agreed-upon time?"

How to prepare:

- Review previous goals — what is their track record of completion?

Commit

Once you've agreed upon and committed to goals, track them in a shared space.

How to prepare:

- For the next meeting, ask reps to come prepared to report on their progress

ADDITIONAL RESOURCES FROM

Winning by Design

Videos available on
the WbD YouTube Channel

ROM

Additional open source templates can be accessed at *www.thescienceofrevenue.com*