

Presented by *planOmatic*

HOW TO GET YOUR TEAM ROWING IN THE SAME DIRECTION

Hosted by Kennedy Watson & Kendall Jarvis

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Resources Handout

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MANAGER 1:1 TEMPLATE

Follow this template for your 1:1 meetings to ensure you are making the most out of your dedicated time together.

[Day, Date]

Completed Action Items

You want to review any completed action items at the start of a 1:1. This allows for visibility for your managers, but also allows for an opportunity for an individual to speak on their work and highlight the impact, as well as any additional important context.

Outstanding Action Items

After the completed action items, you want to review any outstanding action items. This gives your direct reports an opportunity to speak on any roadblocks/barriers, but also allows a window into your direct report's bandwidth.

Current Priorities

These are typically Monthly or Quarterly. These are large focuses or projects that require a lot of attention and take significant time from your team members. You want to touch on the status and any blockers on each of these priorities on a regular basis to make sure that goals are on track.

Discussion List

You want a manager and a direct report to be adding discussion items to a visible, shared discussion list throughout the week. This ensures that any issues are discussed, you're making time for brainstorming, and any key leadership or cross-functional updates are communicated.

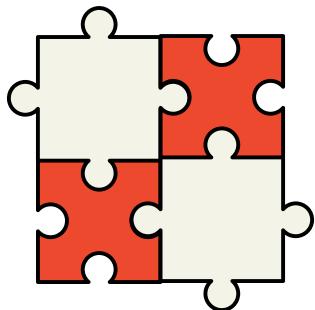
Notes

These are ongoing notes that may not result in an action item or discussion list item, but still should be captured.

Pro tip - As a manager, you should be keeping private notes from your 1:1s as well. This is where you'll store any performance topics, feedback (constructive or positive), or thoughts that you want to make sure you follow up on after your 1:1.

Parking Lot

Insert topics that are on the back burner or should be revisited later. You want to review your parking lot every month to make sure nothing is falling through the cracks.



COMPANY HUDDLE TEMPLATE

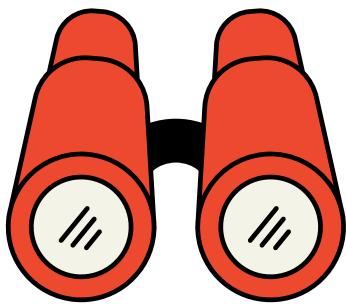
Follow this template for your weekly all-hands meetings to keep all departments up to date on high-level projects.

Leasing Department Update / Focus

- Update #1 (i.e. Contact people who have inquired about available units.)
- Update #2 (i.e. Review vacant unit reports)
- Update #3 (i.e. Address any outstanding maintenance requests or concerns)

Leasing Announcements / Highlights

- Announcement #1 (i.e. Kendall will be OOO on Thursday)
- Highlight #1 (i.e. Successfully onboarded new owner-client with 5 units)
- Highlight #2 (i.e. Filled 1234 Pearl St within 2 days of posting)



EMPLOYEE SURVEYS

Employee engagement surveys are an effective tool for obtaining quantitative and qualitative information about your workforce.

Benchmark Survey Question:

This question gets at whether employees will spread the word positively or negatively to others. It's a good question to include regularly in an employee engagement survey as, over time, you can compare results.

- Would you recommend this organization as an employee to your friends?

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Survey Topics & Questions Pt. I

Teamwork

- People on my team are held accountable for their performance.
- I feel like I'm a part of the team.
- People on my team have clear roles and responsibilities.
- The workload is evenly distributed across my team.

Management

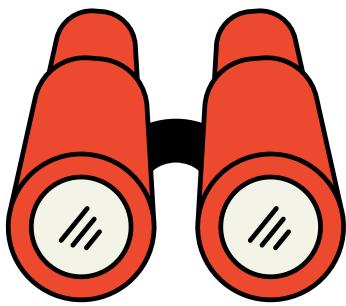
- Management clearly defines business goals and objectives to me.
- I know what is expected of me in my job.
- I feel comfortable talking to my manager about issues that come up.
- I feel that I am well managed.

Autonomy & Ownership

- My workplace environment is comfortable.
- I have the tools and equipment I need to do my job well.
- I have the autonomy to perform my job effectively.

Recognition & Performance

- I believe that my work performance is evaluated fairly.
- I receive recognition from my manager when I do a good job.
- I get feedback from my manager that helps me get better at my job.



EMPLOYEE SURVEYS CONT'D

Employee engagement surveys are an effective tool for obtaining quantitative and qualitative information about your workforce.

Survey Topics & Questions Pt. II

Learning & Growth

- I'm given opportunities to develop my professional growth.
- There are opportunities to grow my career at [Company].
- I understand what I need to do to progress in my career.

Morale & Retention

- How likely do you think [Company] is to succeed?
- I believe that [Company] is moving in the right direction.
- [Company] provides better products/services than its competitors.
- I rarely think about looking for another job.

Benefits

- I'm able to take time off work when I need to.
- The benefits offered at [Company] meet my needs.
- What's one benefit offered today that you would like to see?