💬 1:1 MEETING PLAYBOOK

Structured agenda for SE leader ↔ SE recurring 1:1s

How to use & ground rules: Follow this 30-minute structure regularly (at least every 2 weeks — adapt cadence to each SE). This is coaching time, not status reporting. The SE drives the agenda. Keep a shared running doc so nothing gets lost.

✓ 30 min, non-negotiable ✓ At least every 2 weeks ✓ SE drives the agenda ✓ Cancel = reschedule within 48h
✓ Coaching, not reporting

⏱ BEFORE THE 1:1 (2 MIN PREP)

› Pick ONE deal to go deep on (riskiest or most strategic)
› Review last 1:1 notes — what did they commit to?
› Check: any demos or calls this week to reference?

📝 AFTER THE 1:1 (1 MIN)

› Write down the ONE agreed action item
› Note any deal risks to follow up on
› Flag anything needing escalation

❤️ SECTION 1: PERSONAL CHECK-IN

5 min

Start with the human, not the pipeline. Ask "How are you?" — then actually shut up and listen. Take the question seriously.

" *How are you — really?*
" *What's on your mind this week — what's giving you energy, what's draining it?*
" *What's getting in your way right now that I could help remove?*
" *Where do you feel like you're growing, and where do you feel stuck?*
" *What do you need from me that you're not getting?*
⚡ End with one concrete thing YOU will do for them this week.

👂 LISTEN FOR

→ Consistently low energy = burnout risk, rebalance workload
→ "I'm fine" every week = they're not telling you something
→ Frustration with AE = address before it festers

📈 SECTION 2: SKILL DEVELOPMENT

10 min

Base this on the development plan you set at the start. Pick ONE focus area per quarter — check in on progress each session.

Discovery depth | Demo storytelling | Business acumen | Objection handling | Executive presence | Written communication | POC management | Technical skills | Product skills

" *Where are you on your personal development goal right now? What's shifted?*
" *How did you apply [skill focus] this week? Walk me through a specific moment.*
" *What felt hardest? Where did you get stuck?*
" *I noticed [specific observation from a call] — what was your thinking there?*
" *What would you do differently if you could replay that moment?*
⚡ End with one specific thing to practice this week.

🎯 COACHING TIPS

→ Pick ONE skill per quarter — not multiple
→ Base it on real observations, not assumptions
→ Progress over perfection — celebrate small wins
→ Log commitments so nothing gets lost

🎯 SECTION 3: DEAL DEEP-DIVE

15 min

Focus on ONE deal. Go deep, not wide. Start with the simplest question:

" *WHY is this customer going to spend money with us?*
" *Walk me through the pain chain — core problem, who it affects, business cost?*
" *Who's the economic buyer? Have we met them? If not, what's the plan?*
" *What has the customer explicitly said they need to see to move forward?*
" *If this deal goes dark tomorrow, why? What's the biggest risk?*
" *What's your mutual action plan look like? Dates on everything?*
" *Is there anything on this deal where you need my help — a door to open, a conversation to have?*
⚡ Leave with a clear next step on this deal — owned by the SE, with a date.

👂 LISTEN FOR

→ Vague answers = they haven't gone deep enough with the customer
→ "The AE handles that" = alignment issue to address
→ Can't answer "WHY" = deal isn't qualified yet

💡 **Pro tip — Open vs. Closed Questions:** Use **open questions** when you want to pull real insights ("What's on your mind?", "Walk me through..."). Switch to **closed questions** when it's time for a concrete commitment ("Will you do X by Friday?", "Can we agree on...?").