



One2One™ Planning Worksheet

Name: _____ Date: _____ Convene Team™: _____

Check-in (rating: 1 = A lot of help needed, 3 = Some help needed, 5 = No help needed)

	Rating					Financial, Cultural, Personal, Family, Spiritual Impact
Personal:						
Spiritual Journey	1	2	3	4	5	
Health & Fitness	1	2	3	4	5	
Mental Edge & Creativity	1	2	3	4	5	
Family	1	2	3	4	5	
Friends	1	2	3	4	5	
Personal Stewardship	1	2	3	4	5	
Community & Church	1	2	3	4	5	
Business:						
Working ON (strategic)	1	2	3	4	5	
Working IN (tactical)	1	2	3	4	5	
Direct Report Relationships	1	2	3	4	5	
Balance with Personal Life	1	2	3	4	5	
Isolation	1	2	3	4	5	
Key Indicator Trends	1	2	3	4	5	
Faith/Business Integration	1	2	3	4	5	

Top 3 Issues 1.
 You are
 Currently 2.
 Wrestling
 With: 3.

What is the most important thing you and I should be talking about during our One2One?

Top 5 Annual Goals

Goal	Progress Update	Most Important Next Step
1.		
2.		
3.		
4.		
5.		

Top 5 Things you need to accomplish in next 90 Days	Follow-up from Pervious Months/Progress/Updates
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Prayer Items: