New manager training: practise a first one-to-one that sets expectations

Much new manager training is sold as a programme, but one conversation can be rehearsed in a single session: the first one-to-one, where both people say what they expect. This 80-minute plan gives trios five fictional scenarios with a hidden brief for the team member, an expectations sheet, an observer checklist and a filled example. It is one practice session, not a programme or a certification.

80 minutes | 6–18 participants | Online and adaptable in person

Updated 2026-10-10

The outcome

By the end of 80 minutes each participant has led a practice first one-to-one, played a team member with a hidden concern, observed a third with a checklist and exact words, and planned a real first one-to-one with two checkable expectations, a reason for each and a review date.

Before the session

- For trainers, HR and learning teams who run new manager training for first-time team leads and supervisors, with 6–18 people in trios. It follows the delegation practice in the same leadership series.
- Read “What this practice is not for” first. Choose three of scenarios A, C, D and E for the rounds and keep B for your demonstration. Print the manager cards and the team-member briefs on separate pages.
- Print an expectations sheet per person per round plus a spare, and an observer checklist per round for each trio. Plan trios, with groups of four if the numbers do not divide by three.
- Say that the scenarios are fictional and that nobody plays a real colleague. Offer the observer role or a written version instead of role-play, send the cards as plain text on request, and keep captions on and cameras optional.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- What this practice is not for
- The five parts of a first one-to-one
- Expectations sheet
- Expectation or wish? Eight rewrites
- Manager cards
- Team-member briefs
- Observer checklist
- Filled example: expectations sheet for scenario A
- Filled example: observer checklist for scenario A
- Facilitator section: run of show, reference tables, debrief and adaptations

What this practice is not for

Read this page first. This session rehearses a first one-to-one in which a manager and a team member say what they expect of each other. It is skills practice, not HR, legal or performance-management advice. The topics below belong to other routes and are not for role-play.

Follow your own organisation's policy and local law. This table is a guide for trainers, not HR or legal advice.

Topic	Where it belongs	Why it is not for this practice
A performance problem or an improvement plan	Your organisation's performance process, with HR	A first one-to-one sets expectations for the future. It is not the place to judge the past.
Pay, grade, contract or hours changes	HR and the person's contract	A manager's promise here can conflict with policy or law.
Probation decisions	The organisation's probation process	Expectations can feed a probation review, but the decision follows the process.
Health, disability or workplace adjustments	HR or occupational health, at the person's own choice	Nobody has to share health information in a one-to-one, and nobody role-plays it.
A complaint or grievance	The grievance procedure or HR	It needs a formal route and someone with the authority to act.
A real colleague in the room	Not for practice at all	Use the fictional scenarios only. Nobody plays a real team member or manager.

The five parts of a first one-to-one

An order for a first one-to-one that sets expectations both ways. It was written for this kit. It is not a validated model, and the parts can take more or less time.

Part	What you do	Words you could use
1. Say what the one-to-one is for	Say why you meet, how often, for how long and who brings the agenda. Keep it to a minute.	"We'll meet every second Tuesday for 30 minutes. Your items go first, then mine."
2. Ask before you tell	Ask how they work best and what they need from a manager. Listen, then say back what you heard before you move on.	"What has worked well for you with past managers, and what hasn't?" "So written updates suit you better than calls. Is that right?"
3. Say two or three expectations	Say each one as something you could both see or check, with the reason. Two or three are enough for a first meeting.	"The status column is up to date by Thursday 16:00, because I report on Friday morning."
4. Say what they can expect from you	Offer two or three commitments of your own that you are sure you can keep.	"If I have a concern about your work, you hear it from me first, in private."
5. Check, agree and set a review date	Ask what is hard or does not fit. Ask the team member to say the expectations back in their own words. Agree a date to look at how they work.	"Which of these doesn't fit how you work?" "How would you sum up what we've agreed?" "Let's look at it on 3 November."

Expectations sheet

For the manager. Fill it in before the one-to-one in four minutes. Write notes, not a script. Use a clean copy to plan a real first one-to-one, and keep that copy private.

Scenario: _____ Manager: _____ Round: 1 / 2 / 3

Part	Your notes
1. Why we meet, how often, for how long, who brings the agenda	
2. What I will ask first, about how they work best	
3. Expectation 1: what it looks like, and why	
4. Expectation 2: what it looks like, and why	
5. Expectation 3 (optional): what it looks like, and why	
6. What they can expect from me	
7. My question about what does not fit, and my teach-back question	
8. The review date, and what we will look at	

Expectation or wish? Eight rewrites

For the manager. A wish names a quality; an expectation says what someone could see or check, and why it matters. Read these before you fill the expectations sheet, then rewrite one of your own below.

What a new manager often says	An expectation someone could see or check	A reason you could give
“Be proactive.”	If a deadline is at risk, tell me the same day, with what you need.	“If I hear early I can move work around. On the due date I can’t.”
“Keep me in the loop.”	Update the status column in the team tracker by Thursday 16:00 each week.	“I report to my own manager on Friday morning.”
“Be a team player.”	Answer questions from the two new starters in the team channel within half a working day.	“They can’t move on until someone answers.”
“Communicate better with clients.”	After each client call, send a short written summary to the client and copy me in for the first month.	“The client hears the same thing we heard, and I can see how calls go.”
“Take ownership.”	You decide the order of your own work. Tell me if a piece will miss its agreed date.	“You know your work better than I do. I only need to know about the dates.”
“Be available.”	Keep your chat status up to date between 10:00 and 15:00.	“People can see whether to message you or someone else.”
“Tell me if there’s a problem.”	Bring problems to our one-to-one, or message me the same day if it can’t wait. Bring an option if you have one, but don’t wait for one.	“I would rather hear early with no answer than late with a perfect one.”
“Quality matters.”	Ask a colleague to check any report before it goes to a client.	“A second pair of eyes catches what we stop seeing in our own work.”

A wish of my own, as I would say it now

_____

_____

The same wish as an expectation: what it looks like, and why it matters

_____

_____

Manager cards

Give this page to the manager only, or cut it into five cards. All five situations are fictional. The manager opens the one-to-one.

Scenario	The situation you both know	Your card: only the manager reads this
A. The former peer	Until last month you were both analysts in the same team of six. One of you was promoted to team lead. This is your first one-to-one as manager and team member. It is booked for 30 minutes.	Set two expectations. First: the status column in the team tracker is up to date by Thursday 16:00 each week, because you report to the department head on Friday at 09:00. Second: if a deadline is at risk, you hear about it the same day. You can offer a one-to-one every second Tuesday, with the team member's items first. You worry that the old friendship will make this awkward.
B. The part-time colleague	The manager is new to the team. The team member works three days a week, Tuesday to Thursday. The weekly team meeting is on Monday at 09:30. This is your first one-to-one, booked for 30 minutes.	Set two expectations. First: everyone reads the notes of the Monday team meeting and replies to their actions by Wednesday 12:00. Second: leave goes in the shared calendar at least two weeks ahead, so that cover can be arranged. You can offer a five-minute written summary of each team meeting, or a move of the meeting to a Tuesday.
C. The expert with twelve years	The team member has planned the equipment maintenance schedule for twelve years. The manager joined from another site three weeks ago. Two new technicians start in November. This is your first one-to-one, booked for 45 minutes.	Set two expectations. First: each new technician shadows every maintenance job for their first month. Second: tell the manager before you change the schedule, so that other teams hear in time. You can offer two protected hours a week for training the new technicians, and you would like the team member's view on how to use them.
D. The new starter	The team member started on Monday as a customer support adviser. The manager hired them. This is your first one-to-one, on the Thursday of week one, booked for 30 minutes.	Set two expectations. First: when a customer case is unclear, ask a colleague or the manager rather than guess, especially in the first month. Second: reply to each customer email within one working day, even if the reply only says when a full answer will follow. You can offer a ten-minute check-in each morning for two weeks, then a weekly one-to-one.
E. The remote specialist	The team member works from home in another city and comes to the office once a month. The new manager works in the office. The previous manager left without a handover. This is your first one-to-one, by video, booked for 30 minutes.	Set two expectations. First: keep your chat status up to date during the team's core hours, 10:00 to 15:00. Second: join the Wednesday team call; cameras are optional. You can offer a video one-to-one every two weeks and a reply to messages within half a working day.

Team-member briefs

Give this page to the team member only, or cut it into five cards. All five situations are fictional. Play the person as described, share your concern when the manager's questions make room for it, and ask your question if it is not covered.

Scenario	The situation you both know	Your brief: only the team member reads this
A. The former peer	Until last month you were both analysts in the same team of six. One of you was promoted to team lead. This is your first one-to-one as manager and team member. It is booked for 30 minutes.	You also applied for the team lead role. You are fine with the result, but you want to know whether you keep the client account you have run for two years. Say this only if the manager asks what matters most to you in your work. If the manager has not raised it by the last few minutes, ask: "How do we handle it when we disagree in front of the team?"
B. The part-time colleague	The manager is new to the team. The team member works three days a week, Tuesday to Thursday. The weekly team meeting is on Monday at 09:30. This is your first one-to-one, booked for 30 minutes.	You have missed every team meeting for a year because you do not work on Mondays. Your last manager never asked. Twice you heard about a decision a week late and redid work. Share this only if the manager asks how the team's routines work for you. If the manager does not ask, ask near the end: "Will anything about the team meeting change?"
C. The expert with twelve years	The team member has planned the equipment maintenance schedule for twelve years. The manager joined from another site three weeks ago. Two new technicians start in November. This is your first one-to-one, booked for 45 minutes.	Twice in the past a manager changed the schedule without asking you, and both times it went wrong. You would like to lead the training of the new technicians, but you will not volunteer. Say so only if the manager asks what you would like to own, or where your experience could be used. While the manager only announces rules, answer in short sentences.
D. The new starter	The team member started on Monday as a customer support adviser. The manager hired them. This is your first one-to-one, on the Thursday of week one, booked for 30 minutes.	In your last job, people who asked a lot of questions were seen as slow, so this week you have guessed. On Tuesday you gave a customer a wrong delivery date, and nobody has mentioned it. Mention it only if the manager says that questions are welcome and asks how the week has gone. If the manager does not cover it, ask: "When is it all right to interrupt you?"
E. The remote specialist	The team member works from home in another city and comes to the office once a month. The new manager works in the office. The previous manager left without a handover. This is your first one-to-one, by video, booked for 30 minutes.	Your last manager only got in touch when something had gone wrong, so you learnt to keep your head down. You prefer writing to talking. You would like the one-to-one agenda in writing a day before. Share this only if the manager asks how you like to communicate. If the manager does not cover it, ask: "How will you know I am doing a good job if you cannot see me?"

Observer checklist

One sheet per round. Tick one box for each item and write exact words where you can. Give your notes first, in two minutes or less. Describe what you heard, not the person. This is not a score.

Scenario: _____ Manager: _____ Round: 1 / 2 / 3

What the manager did	Heard	Partly	Not heard	Exact words
Said why you meet, how often and for how long	☐	☐	☐	
Asked how the team member works best before setting expectations	☐	☐	☐	
Said back what they heard	☐	☐	☐	
Said each expectation as something you could see or check	☐	☐	☐	
Gave a reason for each expectation	☐	☐	☐	
Said what the team member can expect from the manager	☐	☐	☐	
Asked for the team member's view on the expectations	☐	☐	☐	
Asked for a teach-back	☐	☐	☐	
Agreed a review date	☐	☐	☐	

Did the team member's concern come out? Which question made room for it?

_____

_____

One thing to keep and one thing to try

_____

_____

Filled example: expectations sheet for scenario A

A fictional round of scenario A, “The former peer”. These are the manager’s notes from the four minutes of preparation. The first one-to-one is on Tuesday 20 October 2026.

Part	The manager’s notes
1. Why we meet, how often, for how long, who brings the agenda	Every second Tuesday, 14:00 to 14:30. Your items first, then mine. We keep one shared action list.
2. What I will ask first, about how they work best	“What has worked well for you with past managers, and what hasn’t?” “What matters most to you in your work right now?”
3. Expectation 1: what it looks like, and why	Status column up to date by Thursday 16:00. Looks like: every row you own has a status and a date. Why: I report to the department head on Friday at 09:00.
4. Expectation 2: what it looks like, and why	Tell me the same day if a deadline is at risk, in a message or in person, with what you need. Why: I can move work around if I hear early.
5. Expectation 3 (optional): what it looks like, and why	Left out on purpose. Two is enough for the first meeting.
6. What they can expect from me	I keep our one-to-one unless I am on leave. If I move it, I offer a new time in the same week. A concern about your work comes from me first, in private.
7. My question about what does not fit, and my teach-back question	“Which of these doesn’t fit how you work?” “So that we hear it the same way, how would you sum up what we’ve agreed?”
8. The review date, and what we will look at	Tuesday 3 November, at our next one-to-one: did the Thursday update work, and did any deadline come close?

Filled example: observer checklist for scenario A

The observer’s checklist for the same fictional round. Heard 6, partly heard 2, not heard 1, of 9 items.

What the manager did	Mark	Exact words and notes
Said why you meet, how often and for how long	Heard	“Every second Tuesday, 30 minutes, and your items go first.”
Asked how the team member works best before setting expectations	Heard	“What matters most to you in your work right now?”
Said back what they heard	Partly	Said back the point about the client account. Did not say back the question about disagreeing in front of the team.
Said each expectation as something you could see or check	Heard	“Every row you own has a status and a date by Thursday 16:00.”
Gave a reason for each expectation	Heard	“I report to the department head on Friday at nine.”
Said what the team member can expect from the manager	Heard	“If I have a concern about your work, you hear it from me first, in private.”

What the manager did	Mark	Exact words and notes
Asked for the team member's view on the expectations	Partly	"Does that sound OK?" The team member said yes and nothing more.
Asked for a teach-back	Not heard	The manager summed up the expectations instead of asking the team member to.
Agreed a review date	Heard	"Let's look at how the Thursday update works on Tuesday 3 November."
Hidden concern	Came out	After "What matters most to you in your work right now?" The team member keeps the client account; the manager said so in the meeting.
Team member's question	Asked	"How do we handle it when we disagree in front of the team?" Agreed: say you see it differently, then talk it through in private the same day.
One thing to keep, one to try	–	Keep: the open question about what matters most. Try: "Which of these doesn't fit how you work?" instead of "Does that sound OK?", then ask for a teach-back.

Facilitator run of show

1 Open, and say what this session is not | 7 minutes

Two minutes: say the purpose. Say: "This is one practice session, not a management programme or a certificate. We will rehearse one conversation that is easy to skip or rush: the first one-to-one, where you and a team member say what you expect of each other." Three minutes: show the table "What this practice is not for" and let people read it. Say: "A performance problem, pay or health is a different conversation with a different route." Two minutes: agree the rules. The scenarios are fictional, nobody plays a real colleague, observers describe what they heard and not the person, and anyone can take the observer role or pass.

2 The five parts and a demonstration | 10 minutes

Three minutes: walk through the five parts of a first one-to-one. Show the expectations sheet and say: "Write notes, not a script." Three minutes: show three rows of "Expectation or wish?" and ask the group to rewrite a fourth, "Be a team player", so that someone could see or check it. Four minutes: play the manager in scenario B for two minutes with a volunteer as the team member. Start badly on purpose: list three rules without asking anything. Stop and ask: "What did the team member get to say?" Then start again with part 2: "How do the team's routines work for you?"

3 Round 1 | 16 minutes

Form trios: manager, team member and observer. Use the three scenarios you chose, not scenario B. Four minutes: the manager reads the manager card and fills the expectations sheet; the team member reads only the team-member brief; the observer reads the observer checklist. Eight minutes: the first one-to-one. The manager opens. Give a two-minute warning, and say: "Two minutes left. Check, agree and set a review date." Four minutes: the observer gives notes first, in two minutes or less, then the team member says what was clear and what was not, then the manager says what they would keep and change.

4 Round 2 | 16 minutes

Rotate the roles: the observer becomes the manager, the manager becomes the team member and the team member becomes the observer. Use a new scenario and the same timing. Say: "This round, ask before you

tell. No expectation until you have asked one open question and said back the answer.” In a group of four, the second observer listens for parts 3 to 5 only.

5 Round 3 | 16 minutes

Rotate again so that each person in a trio has held each role once. Use a third scenario and the same timing. Say: “This round, end with a teach-back. Ask the team member to say the expectations in their own words, and agree a review date.” If time is short, cut the preparation to three minutes, not the notes.

6 Group debrief | 8 minutes

Five minutes: bring the trios together and ask for words, not people. “Which question brought out the team member’s concern?” “Which expectation was hardest to say so that someone could check it?” “What did you offer as the manager?” Collect useful phrases on a shared list or in the chat. Three minutes: ask the observers which item on the checklist was most often not heard. Ask: “What would you say instead?”

7 Plan a real first one-to-one and close | 7 minutes

Five minutes of private writing on a clean expectations sheet. Each person plans a real first one-to-one, or a reset one-to-one with someone they already manage, and writes two expectations with a reason and one thing the team member can expect from them. People who do not manage anyone yet plan for a future team member, or use a scenario card. Nobody shares names. Two minutes: each person reads out one expectation in its checkable form, aloud or in the chat, or passes.

Reference tables

What the observer listens for

The observer marks each item heard, partly heard or not heard and writes exact words. The marks guide the notes. They are not a score of the person.

What the manager did	What counts
Said why you meet, how often and for how long	A purpose, a frequency and a length. “Let’s catch up now and then” does not count.
Asked how the team member works best before setting expectations	An open question about how they work or what they need, asked before the first expectation.
Said back what they heard	A short summary of the team member’s words, checked with them.
Said each expectation as something you could see or check	A time, a place, a frequency or a visible result. “Be proactive” does not count.
Gave a reason for each expectation	Why it matters to the work, the team or a customer.
Said what the team member can expect from the manager	At least one commitment the manager can keep.
Asked for the team member’s view on the expectations	An open question about what is hard or does not fit. “Does that sound OK?” counts as partly.
Asked for a teach-back	The team member said the expectations in their own words. A summary by the manager counts as partly.
Agreed a review date	A date to look at how the expectations are working, said aloud.

Choose three scenarios for your group

For the 80-minute session, use scenario B for the demonstration and three of the other four in the rounds. Scenarios A and D are the easiest to start with.

If your new managers…	Use scenario	What makes it hard
Were promoted from inside the team	A. The former peer	The old friendship, and a colleague who wanted the same job.
Manage part-time or shift workers	B. The part-time colleague	A routine that has never worked for one person, and nobody asked. Used for the demonstration.
Manage people with more experience than they have	C. The expert with twelve years	The team member goes quiet while the manager only announces rules.
Hire new starters	D. The new starter	A small mistake that the new starter is hiding, and a fear of asking questions.
Lead people they rarely see	E. The remote specialist	Expectations about being visible, for someone who prefers writing.

Debrief and next steps

Questions for reflection

- Which question brought out the team member's concern, and what had you assumed before you heard it?
- Which expectation was hardest to say so that someone could see or check it, and how did you say it in the end?
- What did you offer as the manager, and are you sure you could keep it every week?
- When the team member said the expectations back, what did they hear differently from what you meant?

Adapt the session

- For 3 to 5 people, run one trio, a trio and a pair, or a group of four with two observers. In a pair, the manager and the team member each fill in the observer checklist for the conversation afterwards and compare.
- For a 55-minute version, keep the opening (7 minutes), shorten the five parts and the demonstration to 8, run two rounds (32), debrief for 5 and close with one expectation each (3). With two rounds, each person in a trio holds two of the three roles.
- Online, use breakout rooms of three and send each brief by private chat before the rooms open. Paste the round timing into each room and share the observer checklist as an editable document. Cameras are optional; scenario E works well by video.
- For people who prefer not to role-play, offer the observer role in every round, or a written version: the manager writes the opening and two expectations, the team member writes a reply, and both mark the five parts in the text. Passing is always allowed and needs no reason.
- For experienced managers, ask them to plan a reset one-to-one with someone they already manage instead of a first one. To write your own scenarios, keep them fictional and about routines, communication or ways of working, give the team member one concern that comes out only when asked, and leave out every topic in "What this practice is not for".

After the session

Send the five parts and the "Expectation or wish?" table to the group within one working day, with a link to the one-on-one meeting template for the agenda and question bank. Ask each person to hold, or plan, a first or

reset one-to-one within three weeks, and to note afterwards whether they asked for a teach-back and agreed a review date. At the next session of the series, spend five minutes on what people noticed, without names or details of team members. If someone raises a performance, pay or health matter, point them to HR and their own manager.

Questions people ask

What should new manager training include?

Programmes often cover one-to-ones, setting expectations, delegation, feedback and difficult conversations. This page is one practice session from that list, not a whole programme or a certification. It rehearses the first one-to-one with a team member, where both people say what they expect of each other. Run it alone or after the delegation practice.

What should a manager say in a first one-to-one?

Say what the one-to-one is for, how often you will meet and who brings the agenda. Ask how the person works best before you set anything. Then say two or three expectations that someone could see or check, each with a reason, and what they can expect from you. Ask what does not fit, ask for a teach-back and agree a date to look at how it is working.

How is this different from the leadership training activities and the one-on-one meeting template?

The leadership training activities kit is the first session in this series: new leaders practise handing over a task with a level of authority. This kit practises a different conversation, setting expectations both ways in a first one-to-one, with a team member who has a hidden concern. The one-on-one meeting template holds the agenda, the question bank and the action log for regular one-to-ones; this kit does not repeat them.

What does the team member’s hidden brief do?

Each team member holds a concern that comes out only when the manager asks before telling, for example a part-time colleague who has missed every Monday meeting. The observer notes whether it came out and which question made room for it.

How many people do I need, and can I run it online?

Six to eighteen people in trios: a manager, a team member and an observer. When the number does not divide by three, make one or two groups of four with a second observer. Online, use breakout rooms of three, send each brief by private chat and keep cameras optional.

What is included in the free and editable files?

The open PDF has the topics not for this practice, the five parts, the expectations sheet, eight expectation rewrites, the manager cards, the team-member briefs, the observer checklist, two filled examples and the 80-minute facilitator plan. Subscribers also receive the editable Word file, an Excel workbook with the session plan, the scenarios, a blank and a filled expectations sheet, an observer checklist that counts items heard in each round, a trio planner and an expectations log that counts the days to each review date, and a CSV of the session plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.