

Getting Started For Managers: Making 1:1s Easy

www.openblend.com

WHID.

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1. What is OpenBlend?

OpenBlend is a platform designed to enable effective 1:1s to boost performance and develop people.

This guide is here to help you navigate the platform both alone and in a 1:1 with your direct reports.

Topics to discuss in your 1:1s

This guide focuses on navigation only however it's worth highlighting that there are several topics and features available with OpenBlend.

The topics that you have access to are dependent on what has been requested to be set up for your company.

By default, your admin will have set a first topic that you will discuss in the first 1:1 with each direct report.

All other topics that are available to you will be locked after the first 1:1 has been held.

For example, if you have Objectives, Motivators, and Wellbeing, with the Objectives being your first topic, then Motivators and Wellbeing will be unlocked after you have successfully navigated through Objectives, creating at least one and have discussed it in a 1:1.

OpenBlend Topics:

- Objectives
- Motivators
- Wellbeing
- Develop
- Evaluate
- Feedback
- High fives

2. Your homepage

Your homepage will be the first page you land on after logging into OpenBlend or being re-directed after signing in via your company's systems.

Open Blend	Good afternoon Anna! 🔌		1
A Home			
& My 1:1s	My Direct Reports	Manage your 1:1 s here	
84 My Team 🔷	1:1a baset performance and develop		1
© Team Insights	1:1s boost performance and develop	Jessie Parker ····	
DIRECT REPORTS	your direct reports	Book 1:1 + Create agenda	
🚱 Bilui P.			1
Ø Jessie P.		Gloria Brown	
④ Gioria B.		No upcoming 1:1 booked yet	
🕑 Tolu O.		Book 1:1 + Create agenda	1
(1) Izzy C.		A lyzy Chadd	
Ro Me		Izzy Chadd ····	<u></u>
9 Lightbulb		Book 1:1 + Create agenda	
D Notepad			-5.5
 Admin 			
- More			
ASSITANCE	My 1:1		
🖄 Knowledge base	You don't have a 1:1 booked	0	
< Announcements	with Tolu	A EN	
88 Log a support ticket	Your last 1:1 was on 05 December 2023		
as Log a support ticket			

2.1. Navigation:

In the left-hand navigation, you will see:

- Home Easy access back to the homepage
- My 1:1s Review past or upcoming 1:1s with your direct reports
- **My Team** Access to data for each of your direct reports and to Team Tools showing key data for each of the licensed topics for your team
- Me Access to your data
- Lightbulb (only if licensed) Lightbulb gives you access to a library of dynamic coaching video guides to support highly effective 1:1s
- Notepad This is where you can make any notes for yourself, or for you to discuss with your direct report in your next 1:1, by adding the notes to your agenda or logging as an additional 1:1
- Admin (only if you are a manager and admin. This provides access to admin functions)

Your homepage

2.2. Assistance:

- Knowledge base Access to the OpenBlend knowledge base, including FAQ's and How-to's
- Announcements System-wide announcements
- Log a support ticket Access to log a ticket with OpenBlend
- Show a guided tutorial Launches tutorials of OpenBlend

2.3. 'Me':

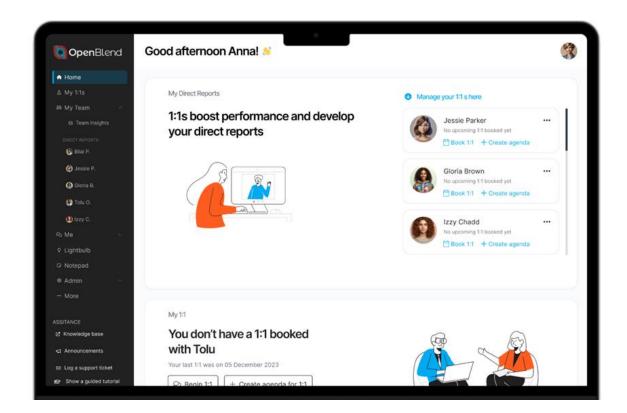
In your navigation panel, you'll be able to:

- View your activity
 - This is an audit trail of everything that you have done within the OpenBlend application
- View your agenda
 - If you have not created an agenda for an upcoming 1:1, this is where you can do that
 - If you have started creating an agenda, details of that will also be shown here
- View your actions
 - This is a list of things that you and/or your direct report have decided in 1:1s that need to take place outside of the 1:1
- A list of all the modules that you have available to you
 - These will be listed. If you see any locked modules, these will be unlocked once you complete your primary module and have your first 1:1

Your homepage

2.4. Main homepage:

- Your icon or avatar in the top right corner:
 - Provides access to your personal information and notification settings
- My Direct Reports:
 - Shows key information related to the 1:1's with each of your direct reports and allows you to book or begin a 1:1 and/or create an agenda
- My 1:1:
 - Shows information for the 1:1's you have with your manager
- Actions:
 - Outlines all actions you have completed, or that are outstanding/overdue
- My Snapshot:
 - This shows a snapshot of your OpenBlend data



3. Booking a 1:1 with a team member

A 1:1 is a session booked and held between a manager and their team member. Both a manager or team member can book a 1:1 and add items to the agenda.

3.1. How do I book a 1:1?

1:1s in OpenBlend can be booked or edited on desktop and mobile.

Under 'My Direct Reports' at the top of the page, looking to the right shows the 'Manage your 1:1's' option.

Here, you can 'Book a 1:1' with a team member if there isn't one booked or 'Edit Booking' for an existing 1:1.

Open Blend	Good afternoon Anna! 👏	Book a 1:1 X
A Home		Step 1 of 2
초 My 1:1s & My team · · 와 Me · · 오 Lightbulb 다 Notepad	My Direct Reports 1:1s boost performance and develop your direct reports	Book in calendar × Add the below email as an attendee to a meeting in your calendar to register it in OpenBlend. t uat-calendar@openblend.com
© Admin ∨ ⊷ More		• 1:1 with () Izzy Change How often would you like to have this 1:1? Fortnightly O Monthly Recommended •
	My 1:1	Custom Frequency
ASSITANCE	You don't have a 1:1 booked with Anna Your last 1:1 was on 05 December 2023 Q1 Begin 1:1 + Create agenda for 1:1	One Off

Booking a 1:1 with a team member

3.2. Booking recurring or one-off 1:1s

When booking a 1:1, you can decide to book in a recurring 1:1 or a one-off. The options available to you are set by your company admin. The options are:

- Fortnightly:
 - This is a session that will be booked every 2 weeks on a day set by you
- Monthly:
 - OpenBlend recommends monthly 1:1s at a minimum but your admin may have set a shorter/longer recommended frequency. This option will book a session that will occur once a month on a date/time set by you
- Custom Frequency:
 - Here, you can decide to create a recurring 1:1 at a frequency you set, e.g., every 3 weeks on a Monday
- One-off:
 - This option allows you to book a one-off 1:1 session

It is not possible to book recurring and one-off 1:1s at the same time, multiple bookings can be made one after another.

Once you have selected the frequency of the session, you can then set the details. Once saved by clicking, 'Complete Booking', the single or recurring session will be booked into the calendars of both you and the person you are having a 1:1 with.

When you book a session in OpenBlend, it will be added directly to your calendar. If you book your 1:1 from your calendar, **please remember to copy in** <u>calendar@openblend.com</u>. We can then remind you of your upcoming session and prompt you to create your agenda.

The next session will be visible on your homepage, and for recurring sessions, all upcoming can be seen via 'My 1:1s' on the navigation panel.

Selecting a specific focus of a 1:1 is not necessary at the time of booking the session. The focus of a 1:1 session is set when an agenda is created.

Booking a 1:1 with a team member

3.3. 1:1 notifications and reminders

When a 1:1 is booked, both the manager and talent will be informed that a session has been booked via email or your instant messaging application. If an agenda is already in place, the email will contain the details. There is more about the agenda later in this document.

Open Blend	
Hi Anna, Your next OpenBlend 1:1 with Bilal is coming up, on 23 October 2023 at 09:00 Here are the Agenda Items for your 1:1.	
 How is it going generally View/Update Challenges View/Update Wins View/Update Stop start continue View/Update 	
Edit Agenda	
 Preparing for this 1:1 Motivators @ How to guide motivator conversations (2 min 30s) Develop @ How to guide develop conversations (2:30) Objectives @ How to guide objectives conversations (2m30) 	
You may also want to update or reflect on your current data in OpenBlend. View/ Update Motivators, View/Update Wellbeing	
Many Thanks, OpenBlend Team	

Both managers and their direct reports will be notified 24 hours before a 1:1 is due to take place. This reminder encourages both parties to ensure that the agenda is up to date and that any updates within OpenBlend are made in time.

In the case that no session is booked, the homepage will show 'No 1:1 booked'. We will remind you that you do not have a 1:1 booked in, by your company's recommended frequency settings.

If you miss a 1:1, we'll notify you by email and your preferred communications platform and provide you with a new link to rebook.

Booking a 1:1 with a team member

3.4. Editing an existing 1:1 booking

It is possible to edit a 1:1 once a booking is in place.

All 1:1s are listed in order under the 'Manage your 1:1s' on the homepage. Selecting a 1:1 here will display the details of that 1:1 in the booking panel.

Details can be updated and saved here.

Open Blend	Good afternoon Izzy! 👏	Update 1:1 series	×
A Home		What date would you like to start?	,
		⊟ 23/04/2024	
₽ Me ✓	You don't have a 1:1 booked	Start time	Duration
Notepad	With Anna Your last 1:1 was on 05 December 2023 Book 1:1 Now	09:00	1hr 🗸
	🕰 Begin a 1:1	Repeat settings	
		On the:	Choose day
		Second ~	Wednesday 🗸
	Actions Create your first objective Add a profile picture Score your wellbeing	What date would you like to end? The default and date for recurring 1대 is set to 런 23/04/2025 Please note: If you update this bookin previously made to individual instance	o 1 year Ig series, any changes you had
ASSITANCE			
↗ Knowledge base ↓ Announcements			
Log a support ticket			
😰 Show a guided tutorial	Snapshot	Cancel th	is series Update this series

4. Creating an agenda

4.1. What is an agenda?

Within OpenBlend, the agenda outlines the items that are to be discussed within a booked 1:1. An agenda can be created without a booked 1:1 in place. When creating an agenda, all changes are automatically saved.

4.2. How do I create an agenda?

The agenda for a 1:1 can be accessed from the 'Manage Your 1:1s' section of the homepage or the left navigation panel for any of your direct reports. In the case that no agenda exists, the option on the homepage will read 'Create agenda'.

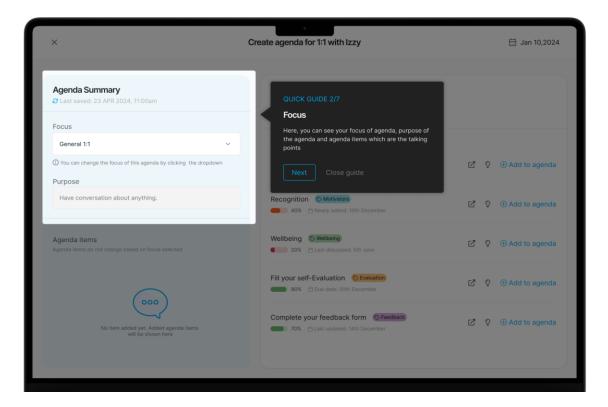
In the case that an agenda has already been started, the option on the homepage will read 'View/Edit Agenda'. Creating an agenda consists of:

- 1. Selecting a focus
- 2. Adding agenda items

Selecting a focus

The focus defines at a high level the type of 1:1 to be had. OpenBlend will provide some by default. Your admin may also make some bespoke options available to you.

In most cases, the selected focus will auto-populate the purpose of the 1:1. The 'purpose' provides additional information on what is to be achieved in the 1:1. It is possible to update the pre-populated purpose if necessary.



Adding or removing agenda items

Agenda items are listed in the right-hand panel of the agenda screen. Agenda items fall into three categories:

- Suggested
- Topics
- Custom

Under 'Suggestions', you will see a list of suggested agenda items. These suggestions are based on settings by your admin and are related to your team members' engagement with the modules available. For example, 'Wellbeing' may be suggested to you if it has not been updated in the last 60 days, or there may be items your company thinks are valuable to be discussed in this particular type of 1:1.

'Topics' relate to the topics that you have access to and allow you to discuss, for example, Objectives overall, rather than choosing to discuss just one objective in the 1:1. You do not have to use the suggested agenda items when you are creating your agenda, they are there as helpful prompts.

Summary Cast saved: 23 APR 2024, 11:00am		Add Agenda Items	
Focus		Smart suggestions by OpenBlend	
General 1:1 (1) You can change the focus of this agenda by clicking	~	Drive £50k in Sales Objectives	Add to agenda
Purpose		Recognition (S) Motivators	
Have conversation about anything.		● 40% 🖆 Newly added: 10th December	Add to agenda
Agenda items Agenda items do not change based on focus selected		Wellbeing Wellbeing 20%	⊕ Add to agenda
II Objectives Overall	View 🗗 📋	Fill your self-Evaluation Sevaluation	Add to agenda
III Chase Marketing for deadline	View 🖻 🗍		
III Discuss Bilal's performance in the team	View 🗗 📋	Complete your feedback form Seedback	⊕ Add to agenda
II Objectives Overall	View 🗗 🎵		

Under 'Custom', you can create a custom agenda item:

× Close agenda	Create agenda for 1:1 with Izzy	🛗 10 JAN 2
Summary S Last saved: 23 APR 2024, 11:00am	Add agenda items More ways to add items to discuss	
Focus	🔓 Suggestions 🗁 Topics 🔤 Custom	
First 1:1 ~	Add custom agenda items	
You can change the focus of this agenda by clicking the dropdown	Type here to input agenda item	🛇 Add module
Purpose	Add to agenda	S Objectives
Have conversation about anything.		
Agenda items Agenda items do not change based on focus selected		

Each suggestion can be added to the agenda by selecting 'Add to Agenda'. Likewise, items can be removed from the agenda using the 'trash' icon.

Agenda items can also be ordered differently from your initial selection order, by clicking, holding, and moving the square of dots on the left of each agenda item. They can be made to recur each time a 1:1 is held by choosing the arrows on the right of each agenda item. The eye icon allows you to view the specific agenda item in more detail on the right-hand side of the screen.

Both you and your talent will be made aware of the contents of an agenda 24 hours before a booked 1:1. Each party is not notified every time changes are made to the agenda.

You can edit a 1:1 agenda at any time. In the case that no agenda is in place before a 1:1 has started, it is still possible to create an agenda during a session.

You will see your agenda items:

- In your session booking in your calendar
- When you receive reminders via email and your communications platform
- By clicking 'View/ Edit Agenda' on your homepage

Reviewing your team's data, past 1:1s, and actions

As a manager, you can look back at past 1:1s by clicking on a direct report in the left-hand navigation to view their summary page and selecting 'Activity' at the top of the page.

You can also look at their data under their profile before the 1:1, or during it by simply choosing the 'Explore and discuss' button.

Preparing for the conversation

You will be notified either by email or your preferred communications platform if anyone in your team updates their data ahead of your 1:1 conversation.

If your direct report has created an agenda, you will have the option to edit the agenda. When you edit, you can add your agenda items.

OpenBlend will nudge both parties to add to the agenda ahead of the upcoming 1:1 conversation.

Making notes ahead of the 1:1

Your notes are private. Your direct report will only be able to see the notes you make before the 1:1 if you decide to add them to the agenda of your next 1:1.

5. Starting a 1:1

5.1. How do I start a 1:1?

A manager or their direct report can start a 1:1 whether a booking is in place or not, by clicking 'Begin 1:1'. Options to start a 1:1 can be found in the top navigation on the right or the homepage.

OpenBlend should be visible to both parties involved in the 1:1 session, whether in person or by sharing a screen virtually. In the case of virtual sessions, only one user needs to begin the 1:1. and share their screen.

😵 Anna — 💽 Izzy _{Manager} —	Currently in a 17 • 34:00 / 28 May 2023 End	1:1
Focus General 1:1 Purpose	Currently been discussed Drive £50k in sales © Objectives	n →
A general check in to discuss anything impacting performance and development goals	• To access all Objectives, the "explore and discuss data" on the agenda panel	
Agenda items + Add Agenda Items	Goal	
III Planning - Senior Leader	25% This objective is measured by milestones. Change	
E Clear career goals and direction	📾 Due: 14 Aug 2049	
Objectives Overall		
II Wellbeing	Reality	
E Complete your feedback form		
Evaluation Overall	Type Alignment Visibility	
⊙ Wrap up	Career Development de Aligned to: Test company objective @ Shared (Visible to wider business) ~	
Explore & Discuss Izzy's data Go into more details for each module	Tags Value: Be Human + Add Tag Scroll to : Obstacles	
	Obstacles SHistory	
📩 asana 🖸 Access asana 🖸	Capture up to three obstacles that you feel are blocking progress at the moment. You can create an action from the obstacle to move through the blocker.	
	Lack of presentational skills	
	+ Add Cancel	

What happens if I start a 1:1 with no agenda?

It is possible to create an agenda within a 1:1. If you don't have a 1:1 booked, and you log in and start a 1:1, you will be offered the opportunity to create an agenda in the moment. The system will guide you through this process.

Starting a 1:1

5.2. What happens in a 1:1?

During a 1:1 session, managers and their direct reports have an opportunity to discuss items that have been added to the agenda by both parties. Selecting each item will change the right-hand side of the screen to follow a set sequence to discuss each time. Most of these follow the GROW framework:

- G (Goal) What was the original SMART goal for this topic?
- R (Reality) What's the status?
- O (Obstacles) What obstacles are there in the way of progress?
- W (Way Forward) What actions need to be taken and by whom?

Once an agenda item has been discussed it will have a green tick next to it. If for any reason an agenda item is not discussed in the current 1:1, it will be carried over to your next conversation and will have a delete option if it is not appropriate for your next 1:1.

If you'd like to make notes during your 1:1, as you discuss each topic, there is the opportunity to add notes at the bottom of the screen. Your notes will be saved in your activity feed and stored in 'My 1:1s'.

If for any reason you would like to change the focus of your session, you can do this at any time by clicking 'Edit' next to the Focus and Purpose section on the left-hand side, or the 'Edit Agenda' button.

If you'd like to see additional data about your talent during the 1:1, click on 'Explore & Discuss [Name]'s data' in the left-hand navigation to see all current data for the individual.

At the bottom of your agenda, you may see some URL links. These are created by your organisation as links that could benefit discussions in your 1:1.

Starting a 1:1

Closing an objective in a 1:1

To close an objective in a 1:1, simply click on the objective item in the agenda, discuss, and then click 'Close Objective' either top right of the screen or towards the bottom. As you close the objective you will be able to score how well your direct report delivered on the objective and add any retrospective comments. Once closed, the objective becomes read-only.

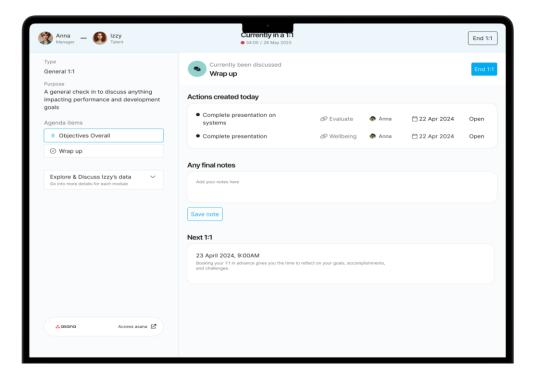
What is an action?

Actions are takeaway tasks that are expected to be completed either by the talent or manager that has been part of the 1:1. These can be seen on the homepage or accessed via the left-hand navigation bar. All actions will have a due date.

As you discuss each agenda item following the GROW model with your talent, you'll agree on actions in the 'Way Forward' section towards the bottom of the page.

What is a 'wrap up'?

Every 1:1 will end with a wrap up, this will show you the actions created in the 1:1, an opportunity to add any additional notes, and remind you of the date of your next 1:1.



Starting a 1:1

Ending a 1:1

It is important to end a 1:1 once the session is complete. This is only necessary for the person who started the 1:1 or who is sharing their screen. 1:1s can be ended by clicking the 'End 1:1' option in the top navigation panel.

After your 1:1

Following your 1:1, you will receive a summary email and/ or instant messaging notification with all actions discussed as part of the conversation. Your top five actions will be on your homepage. Alternatively, you can see all your actions in the 'Me' section in the left-hand navigation. You will also be notified on the due dates of your actions.

The summary of each 1:1 will be stored in 'My 1:1s' that you can access anytime.

6. Manager specific features

Your homepage will be slightly different (showing a list of your direct reports). Below are the additional features and pages within OpenBlend that are available to you.

Within the navigation panel, you will see an option labeled 'My Team'. When expanded, the options available to you are as follows:

- 1. Team Tools
- 2. My Reports
 - a. This will show a list of all of your reports by name. When you select one of your reports, you will be taken to their Summary Page

6.1. Team Tools

When selected, the Team Tools option will display Team Insights for all your reports.

Open Blend	Team Insights	3
ය Home		
≗ My 1:1s	Overview High Fives Objectives Feedback Calendar	
路 My Team 🛛 🔿		
	Current Team: 5 (Previous Team Size: 4) O Time Frame Last 30 days +	
DIRECT REPORTS		
😵 Bilal P.	1:1s Completed 0 Active Users 0 Motivators Updates 0 Wellbeing Updates 0 1 1 1 0 0 0	
🚯 Jessie J.	2 1 _{↑ +1} 2 0 (no change) 2 0 (no change)	
🇐 Eloise H.		
🦚 Tolu O.	Objectives Metrics	^
🚱 Jordan M.	Objectives Metrics	
Pa Me \sim		
♀ Lightbulb	Open Objectives 1 Employees with open 1 Avg. age of open Objectives 3.4	
D Notepad	1 Overdue (Months)	
® Admin ∨	Open	
··· More	Avg. open Objectives 1 Mgrs. of employees 1 Avg. set timeframe of all Objectives (Months) 0.2	
ASSITANCE	(Workins)	
🗗 Knowledge base		
Announcements	Sub Team Objectives 🕐	
E Log a support ticket		

Manager specific features

You will be able to see at a high level, key data for your team. This page aims to give insights on the effective use of OpenBlend by your direct reports and between you as a manager and your direct reports.

6.2. Direct reports summary page

When clicking on any of your direct reports under the left-hand 'Direct Reports' option, a summary page showing all details on that person's use of OpenBlend will be displayed. These include but are not limited to:

- 1. Their activity in the form of a timeline
- 2. The agenda for a forthcoming 1:1, whether booked or not
- 3. The modules that are available to them
- 4. Their assigned actions

Snapshot:

- 1. Details of the next 1:1 or invitation to book one plus the ability to create/view/edit an agenda
- 2. Actions related to the direct report
- 3. A snapshot of all their data

7. Lightbulb

Your organisation may have decided to use Lightbulb, OpenBlend's bite-sized elearning helping you have better quality 1:1's.

Lightbulb content, for the topics licensed for your organisation can be accessed by clicking 'Lightbulb' in the left-hand menu.

You can access these anytime, either before or after your 1:1, but if there is a particular topic you are concerned about discussing during a 1:1, they could be particularly useful when preparing for the conversation.

•	Unlock endless possibilities with our dynamic I your journey to success and embrace a future o				2		
Lightbulb							
		The p	athways				
	L	ightbulb is absolutely jam-packed wit	n all the best information on OpenBlend	d.			
		7 Pathways 0 20 mod	eles a 20 minutes of content				
	Pathways for a manage	*					
	Fattways for a manage						
	Getting started	.i.	Discussing wellbeing in a 1:1	Creating and discussing			
	6 Modules	Discussing motivation in a 1:1 6 Modules	6 Modules	objectives in a 1:1 6 Modules			
	Not started	Not started	Not started	Not started			
	Dicsussing feedback in a 1:1	Y					
	6 Modules	1:1 6 Modules					
	Not started	Not started					
	Pathways for a team member						
	Q	.i.	<i>i</i>	Ø			
	Getting started 6 Modules	Discussing your motivation with your manager	Discussing your wellbeing with your manager	Creating and discussing your objectives with your manager			
	Not started	6 Modules	6 Modules	6 Modules			
		Not started	Not started	Not started			
					-		