



Preparing for the launch of 'Making 1:1s Easy'

Focus types & frequency settings

Preparing for 'Making 1:1s Easy'

Things you need to think about in preparation for OpenBlend 4.0:



1:1 Focuses

You will need to decide on the focuses that you want your users to see when logged into OpenBlend.



1:1 Purposes

Each of your focuses can have a specific purpose and should be defined at the same time.



Suggested Agenda Items

These will be agenda items that you decide specifically for your users to be able to pick from when creating their agendas for their next 1:1.



Frequency Settings

You can decide when a particular module should be suggested within the agenda if it has not been updated in a certain amount of time, set by you.

Please note – these settings will not affect the functionality of the tool until the release of 'making 1:1s easy'. We have decided to grant access to the settings early to allow you to consider your requirements, as these are mandatory settings that will use the default options unless amended.

1:1 Focuses: Admin Settings

As admins, you can access the new 1:1 default settings in the platform.

To do this, go to **Admin > Company Settings > 1:1 Focuses** (see screenshot below)

The screenshot displays the OpenBlend Admin interface. On the left is a dark sidebar with navigation options: Home, My Team, Me, Notepad, Lightbulb, Admin (selected), and More. The main content area shows the 'Company Settings' page for '1:1 Focuses'. A breadcrumb trail reads 'Home / Admin / Company Settings - 1:1 Focuses'. The page title is 'Company Settings'. A list of settings includes: Admin contact, Business Areas, Develop - Settings, Develop - Competencies, Tags, My Objectives Features Enabled, My Objectives Types and Templates, Lightbulb Resources, When to send login emails, Login email content, **1:1 Focuses** (highlighted), and Frequency Settings. The '1:1 Focuses' section contains a list of focus types under 'Openblend defaults': General 1:1, First 1:1, Performance 1:1, Development 1:1, Evaluate 1:1, Probation 1:1, and Holistic 1:1. Each entry has a view icon (eye) and a toggle icon (checkbox). The 'Performance 1:1' toggle is turned on. Below this list is a 'Custom Focuses' section with a '+ Add a new 1:1 focus' link. Callout boxes provide instructions: 'You can see the default 1:1 Focuses already listed' points to the list; 'You can view, clone and toggle these defaults on/off using the icons on the right-hand side' points to the icons; and 'You can add new 1:1 Focus types by clicking on this link' points to the '+ Add a new 1:1 focus' link.

You can see the default 1:1 Focuses already listed

You can view, clone and toggle these defaults on/off using the icons on the right-hand side

You can add new 1:1 Focus types by clicking on this link

1:1 Focuses: Adding a new 1:1 Focus

As admins you can add as many new 1:1 Focuses as you need.

Add New Focus

Focus Title
The Focus' title is what a user sees when choosing between focuses in their agenda.
Enter Focus

Purpose
The purpose is a piece of text that summarizes the aim of the conversation. It displays in the Agenda and in the 1:1 to frame the conversation.
Enter Purpose

1:1 agenda Items
When an employee selects this focus, they will be suggested to add the below 1:1 agenda Items to their 1:1 agenda Items.
[+ Add custom 1:1 agenda Item](#) [+ Add topic item](#)

Cancel Save Focus

Holistic 1:1
Custom Focuses

Begin a 1:1

Home / Admin / Company Settings

Company Settings

Admin contact
Business Areas
Develop - Settings
Develop - Components
Tags
My Objectives For
My Objectives To
Lightbulb Resources
When to send lo
Login email cont
1:1 Focuses
Frequency Sett

Home
My Team
Me
Notepad
Lightbulb
Admin
More

Dashboard
User Information
Reporting
Teams
Training
Strategic Objectives
Scoring Systems
Review Templates
Evaluate Cycles
Company Settings
Demo

OpenBlend

Enter the title of the 1:1 Focus you want to add i.e. Wellbeing 1:1

Create a purpose for the 1:1 which is specific to the focus

Add agenda topics that you would like to be discussed as a part of this 1:1 Focus. You can either select from the default list or create custom items

When you are finished, don't forget to save the new focus

1:1 Focuses: OpenBlend Defaults

1:1 Focuses help you bring consistency to the structure of conversations in your company. We have some OpenBlend defaults that you can switch on or off, as well as letting you create your own custom focuses.

General 1:1 –

- **Purpose:** Regular catch-up to discuss anything
- **Agenda items:**
 - We will display smart suggestions of agenda items based on whether something hasn't been discussed in a while, or if it has been newly added but not yet discussed (e.g., a new Motivator), or if it has a pending due date.

First 1:1 –

- **Purpose:** This will introduce you to Objectives and the experience of having a 1:1 with OpenBlend.
- **Agenda items:**
 - The agenda item suggestion will be your organisation's primary module.

Performance 1:1 –

**Linked to our Objective's module*

- **Purpose:** To discuss performance overall, uncover highlights, and identify anything blocking progress.
- **Agenda items:**
 - Objectives overall
 - Actions overall
 - What are the highlights from performance over the last 4 weeks?
 - What, if anything, is blocking performance?

1:1 Focuses: OpenBlend Defaults

Probation 1:1 –

**Linked to our Evaluate module*

- **Purpose:** To discuss the highlights & development areas from the probation period.
- **Agenda items:**
 - Evaluate Cycles
 - Objectives Overall
 - Actions Overall
 - Feedback Overall
 - How has the probation period gone overall?

Evaluate 1:1 –

**Linked to our Evaluate module*

- **Purpose:** Time to review and evaluate performance with a focus on both the past and plans for success moving forward.
- **Agenda items:**
 - Evaluate Cycles
 - Feedback Overall
 - How have you found the evaluation process so far?
 - Any further areas to discuss?

1:1 Focuses: OpenBlend Defaults

Development 1:1 –

**Linked to our Develop module*

- **Purpose:** To understand & discuss development plans.
- **Agenda items:**
 - My development
 - How do you feel your development is progressing overall?

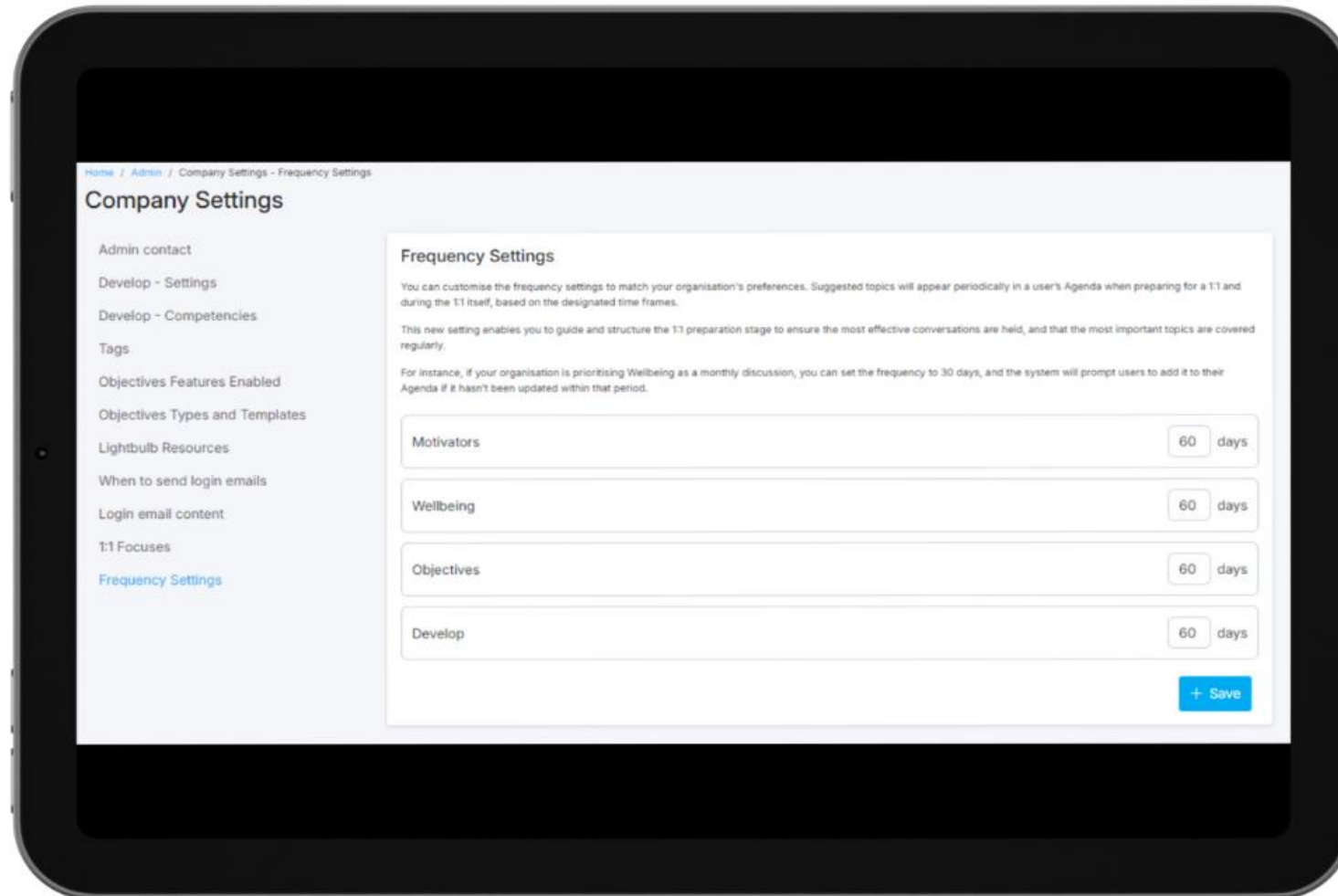
Holistic 1:1 –

**Linked to our Motivators module*

- **Purpose:** An opportunity to discuss the holistic aspects that enable us to work to the best of our ability.
- **Agenda Items:**
 - Motivators Overall
 - Wellbeing Overall
 - Any other areas of support needed?

Frequency Settings

You can customise the frequency settings to match your organisation's preferences. Suggested topics will appear periodically in a user's agenda when preparing for a 1:1 and during the 1:1 itself, based on the designated time frames. By default, all options are set to 60 days.





If you have any questions, please do not hesitate to contact your Customer Success Manager who is on-hand to help.